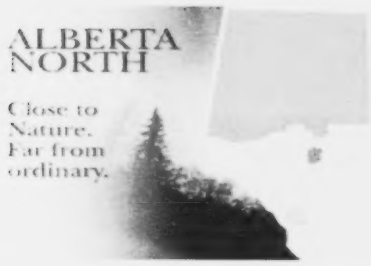

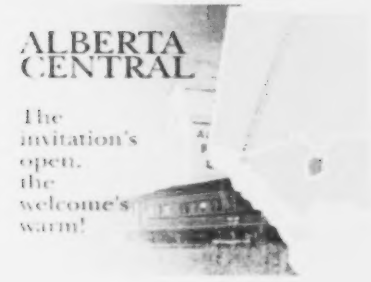

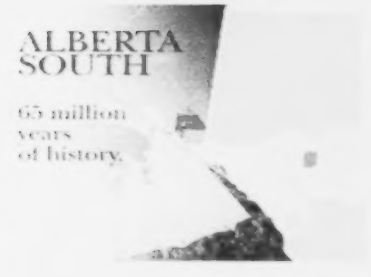

British Columbia / Saskatchewan Residents Survey of Travel Intentions Final Report

May 2003 to October 2003 Travel Season

Alberta Economic Development Canada

Alberta Motor Association

Tourism Calgary

Economic Development Edmonton

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TABLE OF CONTENTS

1.0 Introduction ..... Page 1

2.0 Research Approach ..... Page 1

3.0 Provincial Overview ..... Page 4

4.0 British Columbia Respondent Profile ..... Page 18

5.0 Saskatchewan Respondent Profile ..... Page 30

1.0 INTRODUCTION

In April 2003, under the direction of Alberta Economic Development, the 2003 British Columbia/Saskatchewan Resident Survey of Travel Intentions was conducted on behalf of a partnership of Travel Alberta and the Strategic Tourism Marketing Council (STMC), the Alberta Motor Association, Tourism Calgary and Edmonton Tourism. This research included two (2) components; 1,400 surveys were conducted with residents of Alberta, and another 1,400 surveys were conducted with residents of Saskatchewan and B.C. with respect to their intentions for travel in Alberta. The Alberta results are reported under separate cover, while this report includes the results of the BC/Saskatchewan research.

It is anticipated that the BC/Saskatchewan research component will become a benchmark and tracking study that will be conducted once a year on a recurring basis for a minimum period of three years. The key objective of this study is to gather information regarding leisure travel intentions of BC/Saskatchewan residents for a six month period, with a primary focus on travel to Alberta.

The results of the study will provide information to Alberta's tourism business and Destination Marketing Organizations (DMOs) to assist them in modifying marketing initiatives, and/or help them to response effectively to trends and intentions. The results of this study are actionable as they clearly identify and describe intentions for travel to Alberta by province.

2.0 RESEARCH APPROACH

This research will serve as the benchmark for all future waves of data collection and involved a quantitative survey with 801 British Columbia residents and 600 Saskatchewan residents.

Survey Methodology

In order to address the study objectives, a comprehensive survey document was developed in collaboration with the Partnership members. The telephone interview technique was used to complete the survey with the 1,401 respondents. (A copy of the survey for each province can be found in Appendix C)

Telephone surveys were conducted between May 7 and May 30, 2003, between the hours of 5:00pm and 9:00 pm weekday, and 10:00 am to 6:00 pm weekends. Interviews required an average of 11.1 minutes to complete, with the longest survey lasting 16.4 minutes. The screening criteria required the respondent to be over 18 years old, and the person in the household with the next birthday. To complete the survey, the respondent was required to have traveled on at least one overnight leisure trip in the previous 12 months, and with plans to travel on at least one overnight trip over the next 6 months.

Sampling

As the universe for the study was all adults living within British Columbia and Saskatchewan who met the screening criteria, a randomly generated sample was purchased from the Telus Super Pages list services. The source included all current residential telephone listings that are accurate within one month of the commencement of data collection. The random sample was designed to reflect the actual population distribution within each of the provinces.

Data Collection

The CATI system used to conduct the survey allowed interviewers to key answers directly into SPSS. Range checks and electronically programmed skip patterns ensures that high quality data is provided. As the open-ended questions were highly detailed, extensive manual coding was required to place destinations into Tourism Regions within Alberta. Interviews were conducted by Province and finally merged into one large database.

Fielding statistics reflect that 4,742 telephone numbers were dialed at least one time during the data collection period. Overall, 24% of British Columbia and 44% of the Saskatchewan telephone numbers resulted in a completed interview.

Of the 76% of numbers in B.C. that did not result in completed surveys, 44% were ineligible, 8% were not in service, .1 % were business or fax lines, and 8% refused participation; the remaining 16% did/could not respond for other reasons such as being away for the duration of the study, the respondent terminated the survey and eligible numbers were exhausted. Of the 56% of numbers in Sask. that did not result in completed surveys, 37% were ineligible, 5% were not in service, .1 % were business or fax lines, and 2% refused participation; the remaining 12% did/could not respond for other reasons such as being away for the duration of the study, respondent terminated the survey or eligible numbers were exhausted and contact could not be made. (See Table 1 below)

Table 1: Fielding Statistics

Status	TOTAL	British Columbia	Saskatchewan
Completes	1,401 29.5%	801 23.6%	600 44.4%
Dead Numbers	3,341 70.4%	2,591 76.4%	750 55.6%
Language/Hearing Problems	197 4.2%	170 5.0%	27 2.0%
Respondent away for duration of study	15 0.3%	12 0.4%	3 0.2%
Business/Fax Line	6 0.1%	5 0.1%	1 0.1%
NIS	349 7.4%	282 8.3%	67 5.0%
Survey Terminated	108 2.3%	66 1.9%	42 3.1%
Refused	281 5.9%	257 7.6%	24 1.8%
Ineligible –no leisure travel of 80km from home in past 12 months	1,808 38.1%	1,312 38.7%	496 36.7%
Ineligible – no trips planned in next 6 months	177 3.7%	170 5.0%	7 0.5%
TOTAL SAMPLE USED	4,742	3,392	1,350
Eligible Exhausted (dialled 5 times)	278	173	105

Some 1,808 potential respondents from British Columbia and Saskatchewan combined did not qualify to participate in the study as they had no plans to travel for leisure at least 80 kms away from home within the next six (6) months. This represents 38% of the sample who did not qualify to complete a survey.

Margin of Error

A sample size of 1,401 provides an overall **margin of error of ±2.67%, 19 times out of 20**. At a 95% confidence level, these statistical parameters mean there is a 5%, or 1 in 20, probability that the sample population data does not reflect the larger study population, plus or minus the margin of error; smaller sub-samples have higher margins of error. Table 2 on the following page outlines the various sample sizes and margins of error for the sub-samples.

Table 2: Sampling Distribution

95% confidence level	Sample size n=	Margin of Error
Total	**1,401**	**± 2.67%**
British Columbia	**801**	**± 3.53%**
Saskatchewan	**600**	**± 4.08%**

It should be noted that throughout the report and during the discussion of statistical findings, totals do not always equal 100 due to rounding, and/or single or multiple response categories.

Report Layout

This report is broken into three (3) main sections. The following Section 3.0 is a Provincial Overview where comparisons of the responses from both Saskatchewan and British Columbia are reported. Section 4.0 consists of a profile of British Columbia Resident responses, and section 5.0 consists of a profile of Saskatchewan Resident responses.

3.0 Provincial Overview

The purpose of the Provincial analysis is to search for patterns of shared, or different, characteristics within given geographic-based populations. The basis of this comparison is the survey responses from the provinces of British Columbia and Saskatchewan.

The following presents the findings from a provincial segmentation of the data. Appendix B contains the detailed Cross-tabulated Data Tables that present the frequencies and statistics for each question in the survey document, for each province. The tables are labeled by the number of the survey questions from Q.1 to Q.18. The following section is an overview of the key differences between each Province.

A. Overview of Regional Differences

The key statistical differences found between the two (2) provinces are as follows:

Respondents were first asked to indicate the number of trips their household intends to take between June 1 and November 30th, 2003. The trips to be excluded from this response include:

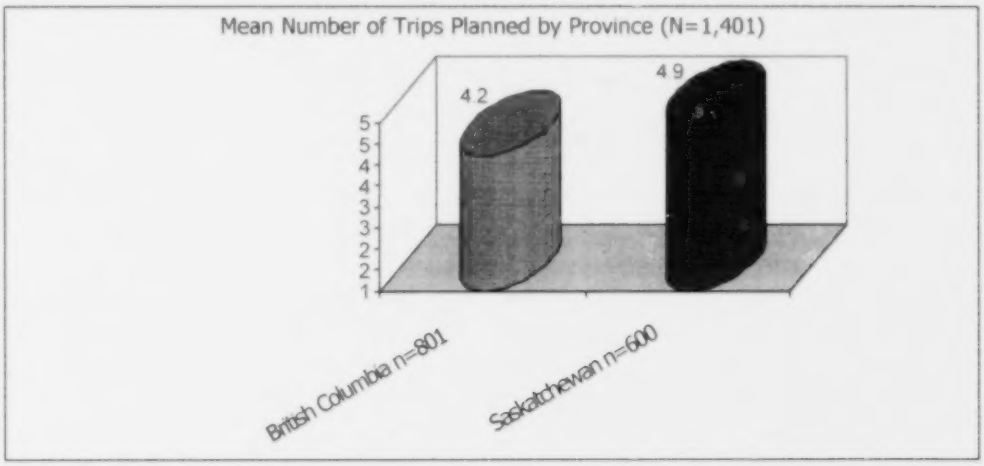
- Trips of less than 80 km away from home
- Personal errands (i.e. going for groceries, doctor appointments)
- Commuting to and from work
- Moving to a new residence

The number of intended trips over the next six months ranged anywhere from one (1) to 60 trips, with respondents, overall, averaging 4.5 trips for the next 6 months.

- British Columbia respondents were planning fewer leisure trips overall (mean=4.2) compared to Saskatchewan respondents (mean=4.9)

(See Figure 1 on the following page)

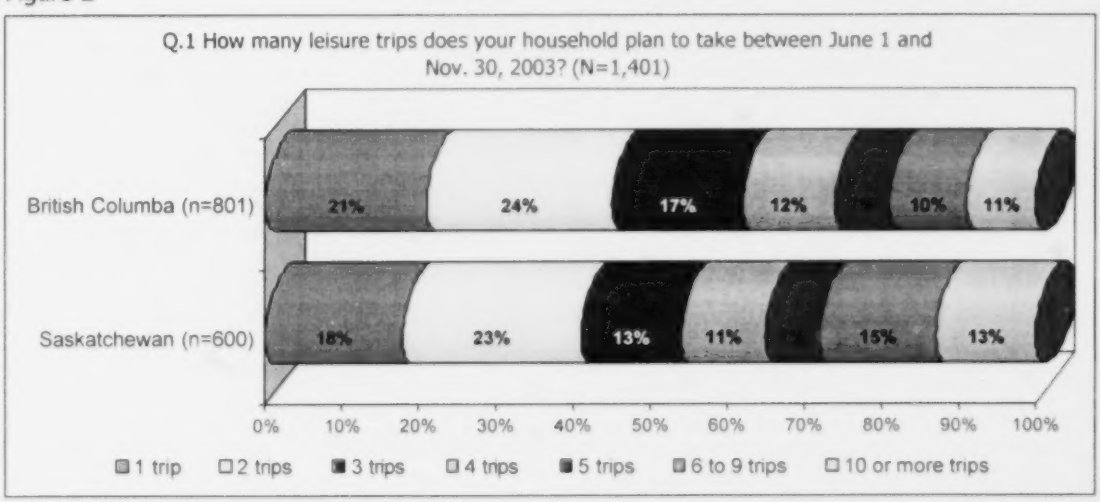
Figure 1



The number of respondents taking between one to five trips over the next six months falls into the range of 7% to 24% depending on the province.

Respondents in British Columbia tend to plan fewer trips than those from Saskatchewan. Some 10% more of BC respondents (81%) are more likely to plan to take 1 to 5 trips over the next 6 months, while a smaller 72% of Saskatchewan respondents plan to take 1 to 5 trips. Seven percent more Saskatchewan respondents than BC Respondents said they will take 6 or more trips over the next 6 months. (Figure 2 below)

Figure 2



When asked to distinguish between the trips within their own province and trips to Alberta, the respondents from both provinces indicated that on average they intend to take 2 to 3 more trips within their own province than they will take to Alberta over the next 6 months.

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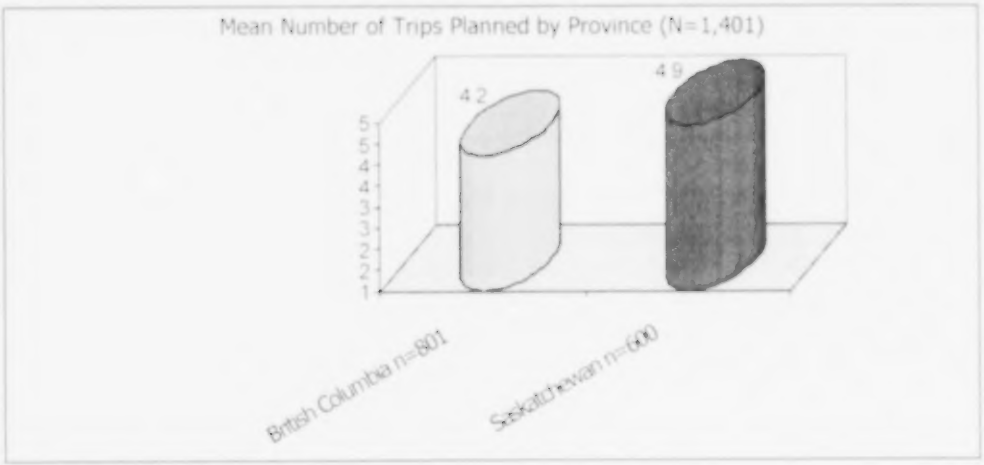

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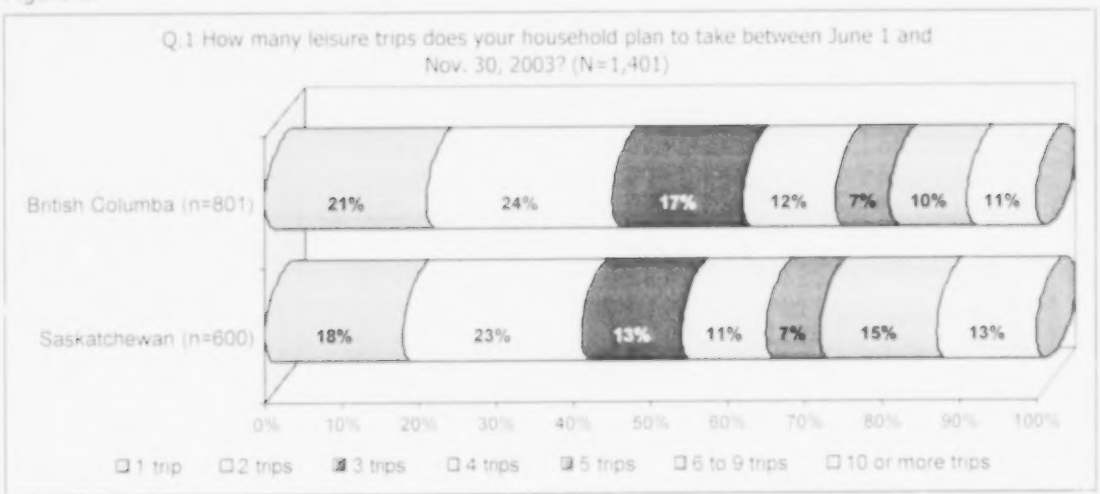
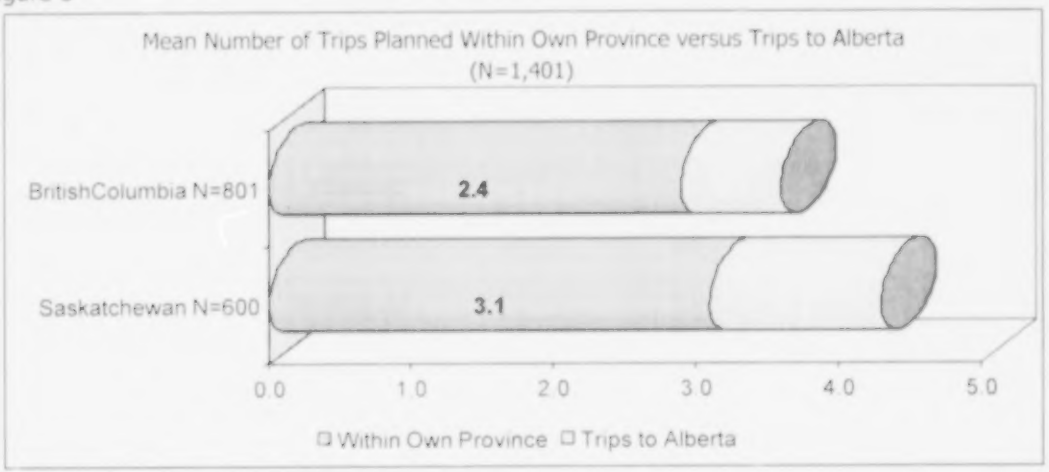


When asked to distinguish between the trips within their own province and trips to Alberta, the respondents from both provinces indicated that on average they intend to take 2 to 3 more trips within their own province than they will take to Alberta over the next 6 months.

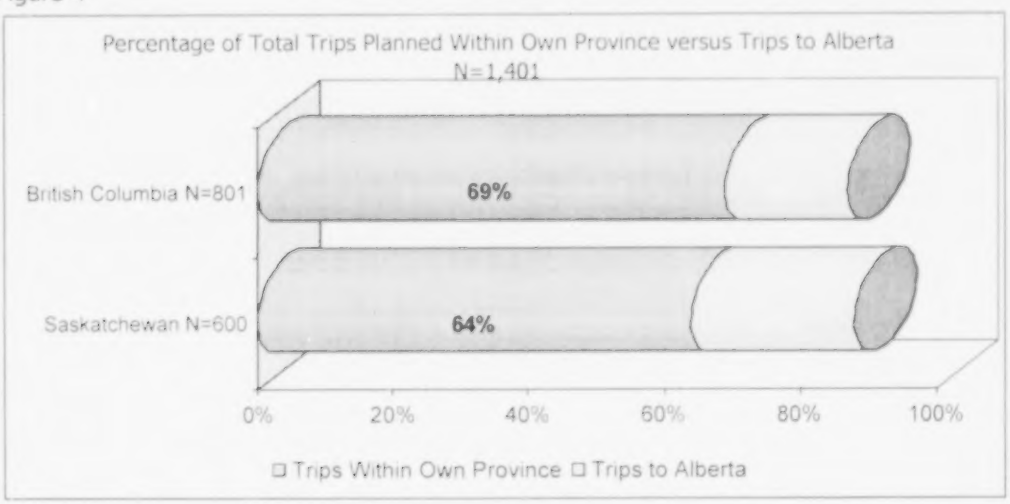
On average, British Columbia respondents plan to take slightly fewer trips (mean=2.9) within their own province than Saskatchewan respondents will take within their own province (mean=3.1). Also, on average, Saskatchewan respondents are more likely to plan to take more than 1 trip to Alberta over the next 6 months (mean=1.2), while British Columbia respondents plan to take slightly less than one trip (mean=0.7). (See Figure 3 below)

Figure 3



When reviewing the proportion of total numbers of trips taken by respondents, of the overall 3,371 trips planned by British Columbia respondents 69% will be within their own province and 18% will be to Alberta. Sixty-four percent (64%) of the 2,951 trips taken by Saskatchewan respondents will be made within their own province, and 24% of these trips made to Alberta over the next six months. (See Figure 4)

Figure 4



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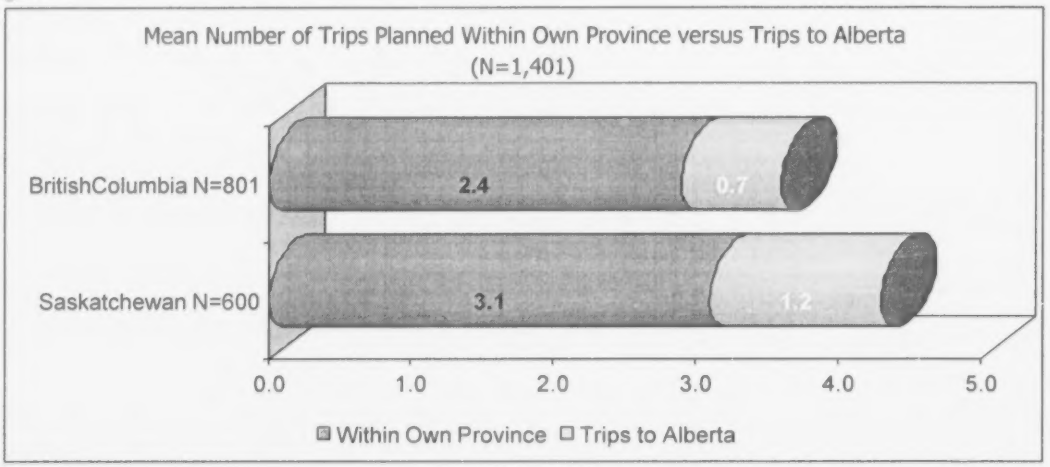

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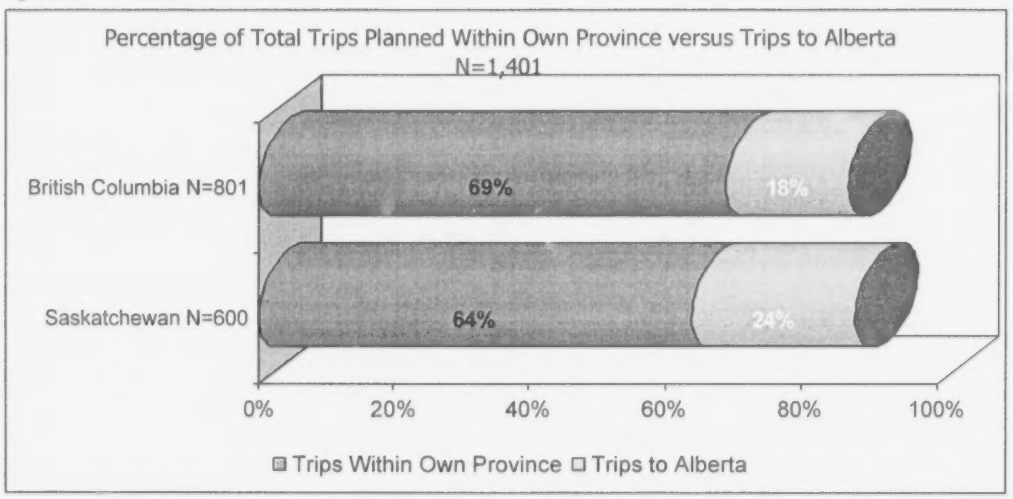


Regardless of the province, the highest number of respondents not planning any leisure trips to Alberta over the next six months indicated theyh ave *"no interest in traveling to Alberta, or prefer destinations other than Alberta"*. This response is 10% higher for respondents from B.C. (30%) than from Sask. (20%). Other reasons for not traveling to Alberta are detailed in Table 3.

Table 3

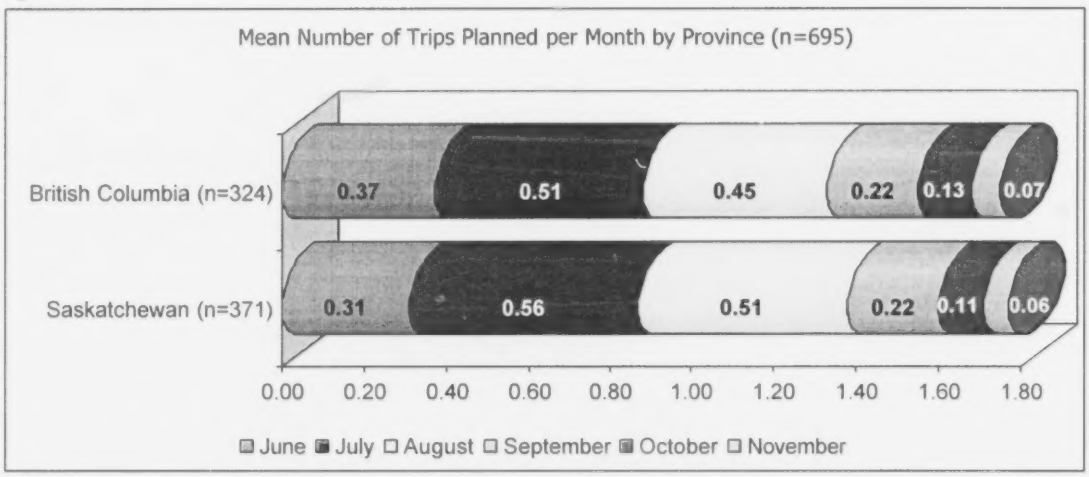
Q.4 Is there any particular reason why you do not intend to make any leisure trips to Alberta in the next 6 months (Multiple Response) (n=706)	**British Columbia n=477**	**Saskatchewan n=229**
No interest/prefer destinations other than Alberta	29.8%	20.5%
No time – too busy	8.6%	17.0%
Have been to Alberta recently, won't go again over next six months	11.9%	14.1%
Staying close to home this year	9.6%	7.0%
No money – financial	5.5%	6.6%
Not aware of leisure vacation opportunities in Alberta	2.7%	0
The weather	0.8%	0.4%
Other;	44.4%	45.9%
• No relatives living in Alberta	14.9% (71)	10.5% (24)
• No particular reason	17.8% (85)	24.5% (56)
• Nothing in AB that BC/SK doesn't have	3.4% (16)	2.2% (5)
• Going on other long/international trips this year	3.1% (15)	1.3% (3)
• Alberta is too far to travel	2.7% (13)	1.7% (4)
• Vacation property is located outside of Alberta	0.6% (3)	1.7% (4)
• Too busy with work	0.6% (3)	1.3% (3)
• Alberta is too expensive	0.4% (2)	0.9% (2)
• Go to Alberta in the winter		1.3% (3)
• Mad Cow Disease	0.2% (1)	0

Alberta Visitors (n=695)

When asked to indicate the specific months they plan to travel to Alberta, Figure 5 shows that Saskatchewan respondents are planning more trips to Alberta during July and August than respondents from British Columbia. However, during June, October and November travelers from British Columbia will make more trips to Alberta.

(Figures 5 and 6 demonstrate the response to this question both by mean and by percentage)

Figure 5



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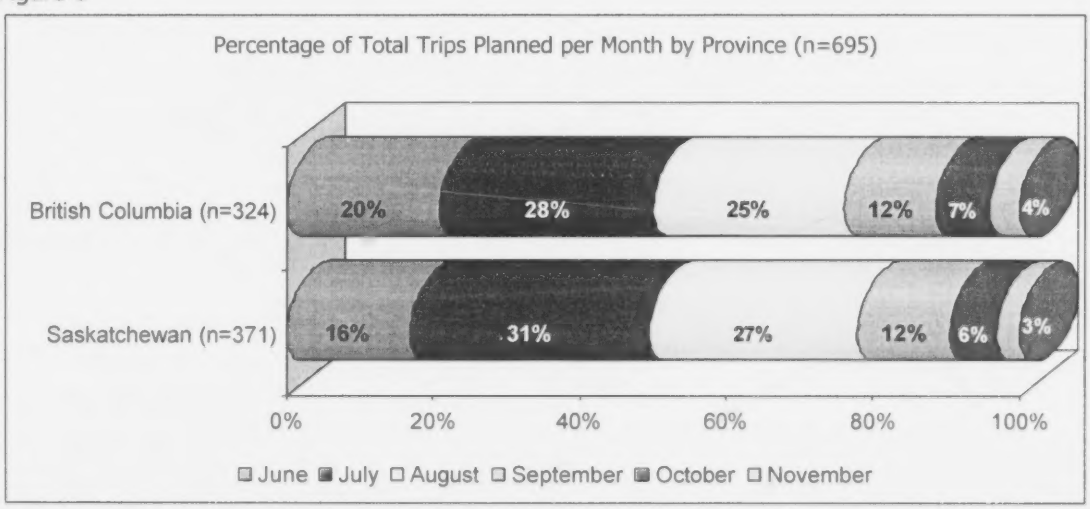

On average, respondents from British Columbia plan to make the most overnight trips and the most trips of one week or longer, with a mean of 0.20 overnight trips and a mean of 0.67 for one week or longer trips. Saskatchewan respondents plan to take fewer of these trips with an average of 0.18 overnight trips and 0.57 trips of one week or longer. On the other hand, Saskatchewan respondents plan to make more weekend or long weekend trips to Alberta; a mean of 1.11 trips compared to a mean of 0.91 weekend or long weekend trips planned by British Columbia respondents. (See Figure 7 below)

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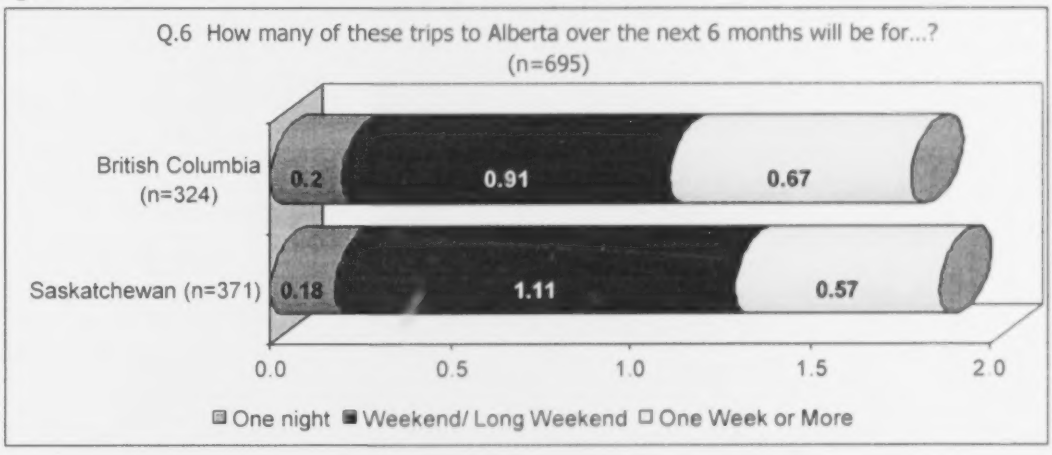

7

When reviewing the proportion of total number of trips planned to Alberta, 50% of all Alberta trips planned by British Columbia respondents and 59% planned by Saskatchewan respondents are for a weekend or long weekend. Thirty-six percent (36%) of trips to Alberta by British Columbia respondents will be for one week or longer, with 30% of Saskatchewan respondents planning trips to Alberta for the same length of time. Almost an equal number of respondents from both provinces plan to make overnight trips. (Figure 8 below)

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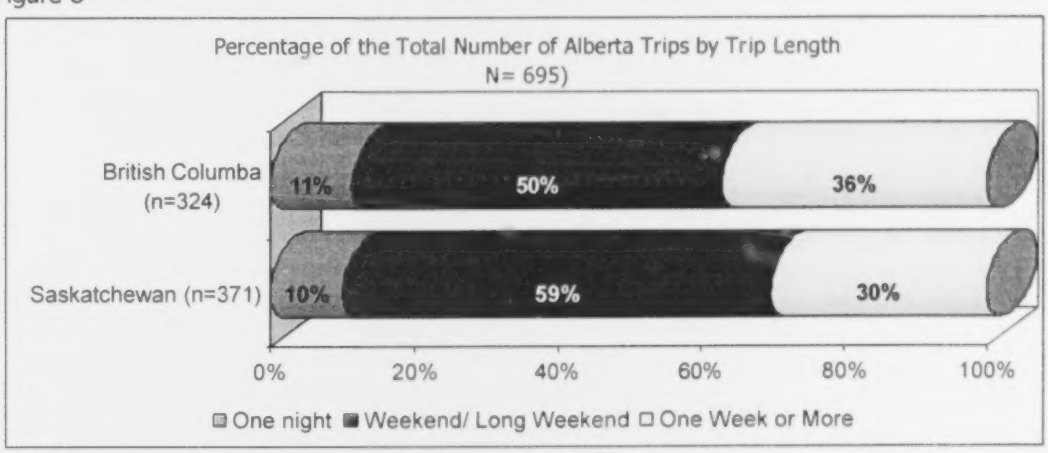

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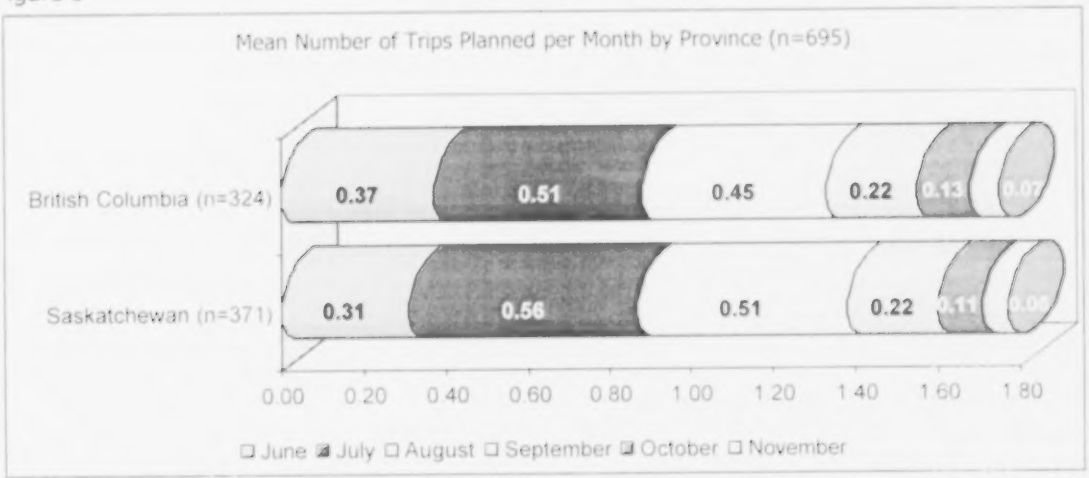

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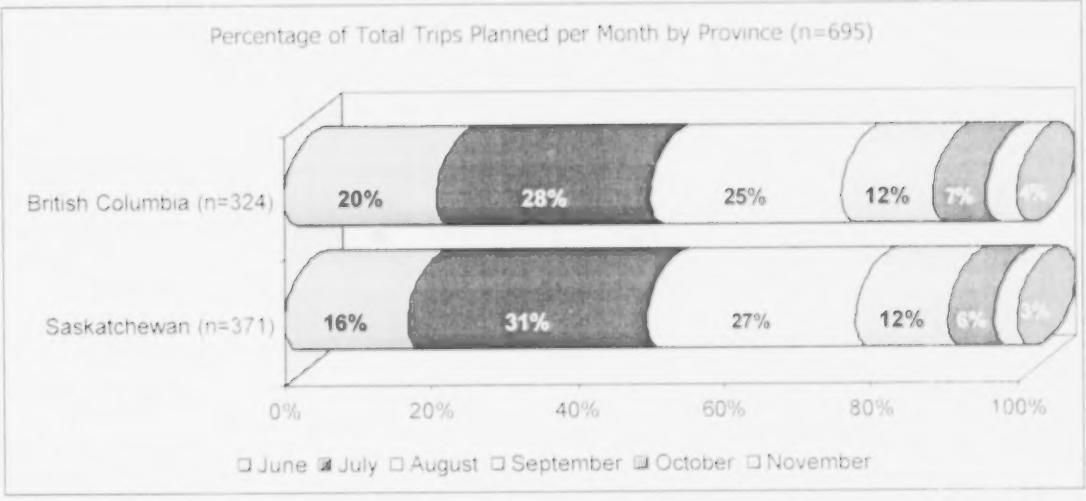

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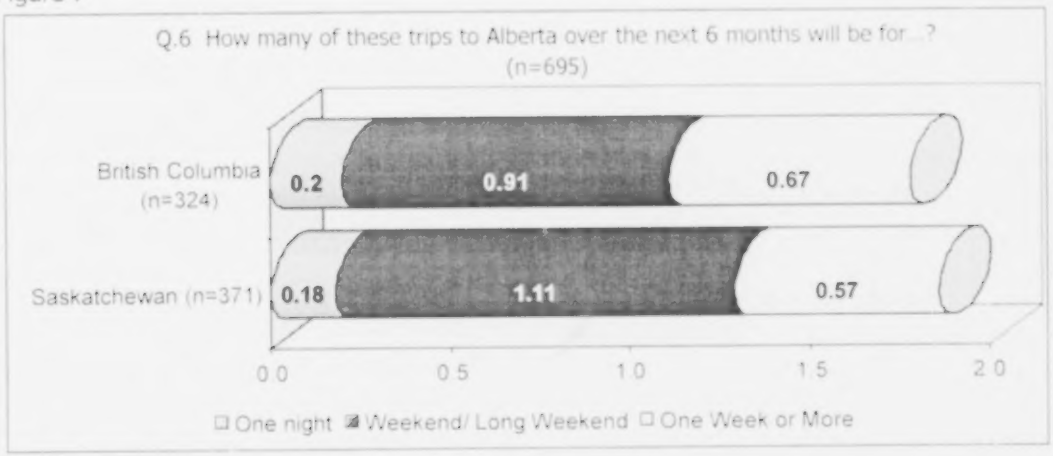

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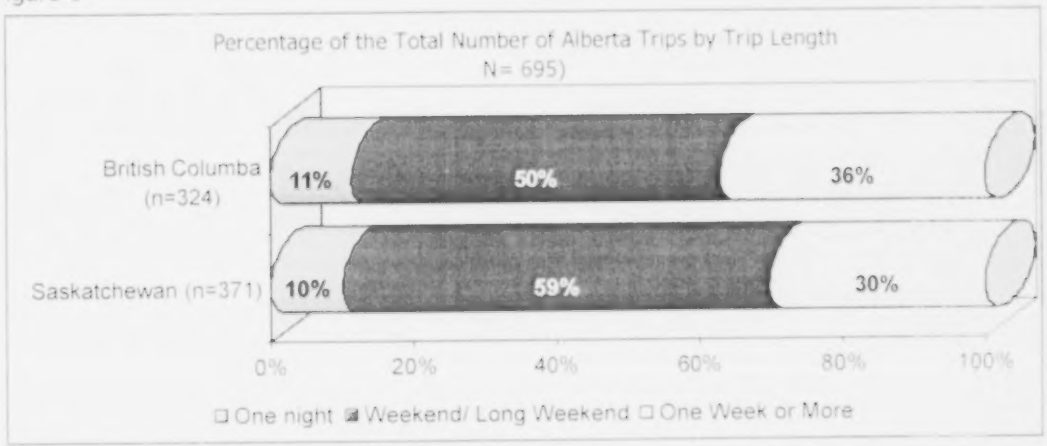


The range of days typically needed to plan both weekend and week or longer trips falls between less than 1 day to a full year.

Respondents from British Columbia appear to require less time to plan both their weekend trips (25.5 days) and trips of one week or longer (50.3 days), compared to respondents from Saskatchewan who tend to plan for 30.7 days for weekend or long weekend trips, and 51.2 days for trips of one week or longer to Alberta. (See Table 4 below)

Table 4

Q.7 How many days in advance do you typically plan leisure trips to Alberta for...	Range	Mean	Mode	Not Applicable
A. Weekend trips			**30 days**	
▸ **British Columbia**	**0 to 200**	**25.5 days**	**(18.8%)**	**n= 31**
▸ **Saskatchewan**	**0 to 365**	**30.7 days**	**(22.9%)**	**n= 30**
B. Trips of one week or longer			**30 days**	
▸ **British Columbia**	**0 to 365**	**50.3 days**	**(25.6%)**	**n=34**
▸ **Saskatchewan**	**0 to 365**	**51.1 days**	**(25.3%)**	**n=64**

**These respondents indicated they do not typically take trips of this length when traveling to Alberta*

Destinations

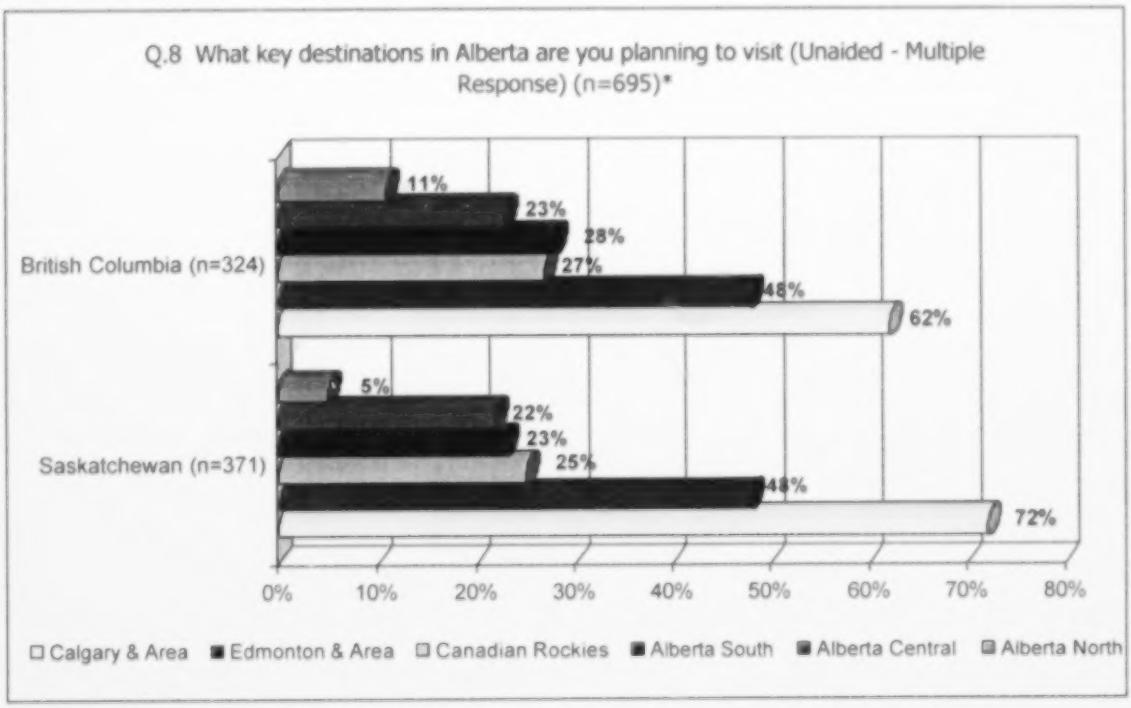
When asked about the destinations they plan to visit in Alberta over the next six months, both British Columbia and Saskatchewan respondents follow a similar trend by naming destinations in the Calgary & Area region (BC–62%, SK–72%), and the Edmonton & Area region (Both-48%). Some 10% more travelers from Saskatchewan will visit destinations in the Calgary & Area region than visitors from British Columbia.

Similar numbers of respondents from both British Columbia and Saskatchewan named destinations in the Canadian Rockies (BC–27%, SK–25%), Alberta South (BC–28%, SK–23%) or Alberta Central (BC–23%, SK–22%).

Alberta North was the least popular region among both British Columbia respondents and Saskatchewan respondents, however, twice as many respondents from British Columbia (11%) plan to visit Alberta North region than travelers from Saskatchewan (5%).

(See Figure 9 on the following Page)

Figure 9



Please note that these results do not take into account the frequency of planned visits to each key destination

Activities

Respondents were asked to indicate how likely they are to participate in a variety of activities while on leisure trips. The most popular activity among respondents from both provinces was *Visiting family and friends,* with a mean of 3.7 out of 4 for both groups.

Two other activities respondents are very likely to participate in are Indoor Leisure Activities (3.2 out of 4) and Outdoor Leisure Activities (3.1 out of 4). Indoor Leisure Activities are slightly more popular among Saskatchewan respondents (3.3 out of 4) than British Columbia respondents (3.1 out of 4).

Four (4) other activities are popular with both British Columbia and Saskatchewan respondents. This includes Museums and Historical Sites (2.6 out of 4), Outdoor Summer Sports (2.5 out of 4), Attractions (2.5 out of 4) and Outdoor Recreation (2.4 out of 4). Festivals & other Cultural Activities are slightly more popular with British Columbia respondents (2.2 out of 4) than with Saskatchewan respondents (2.0 out of 4)

The least popular activities with respondents from both provinces include Team Sports (1.5 out of 4), Outdoor Winter Sports (1.5 out of 4), Spas & Other Health Club (1.5 out of 4) and Outdoor Adventure activities (1.4 out of 4). (See Table 5 on following page)

Table 5

Q.9 Activities	Overall n=695	British Columbia n=324	Saskatchewan n=371
Visit Friends & Relatives	3.7	3.7	3.7
Indoor Leisure Activities	3.2	3.1	3.3
Outdoor Leisure	3.1	3.1	3.1
Museums & Historical Sites	2.6	2.6	2.6
Outdoor Summer Sports	2.5	2.6	2.5
Attractions	2.5	2.5	2.5
Outdoor Recreation	2.4	2.5	2.4
Festivals & Cultural Activities	2.1	2.2	2.0
Calgary Stampede/ Klondike Days	1.8	1.9	1.8
Spectator Sports & Entertainment	1.8	1.8	1.9
Organized Sports Events	1.6	1.6	1.5
Aboriginal Attractions	1.6	1.7	1.6
Team Sports	1.5	1.5	1.6
Outdoor Winter Sports	1.5	1.5	1.5
Spas & Other Health Club	1.5	1.5	1.5
Outdoor Adventure	1.4	1.4	1.4

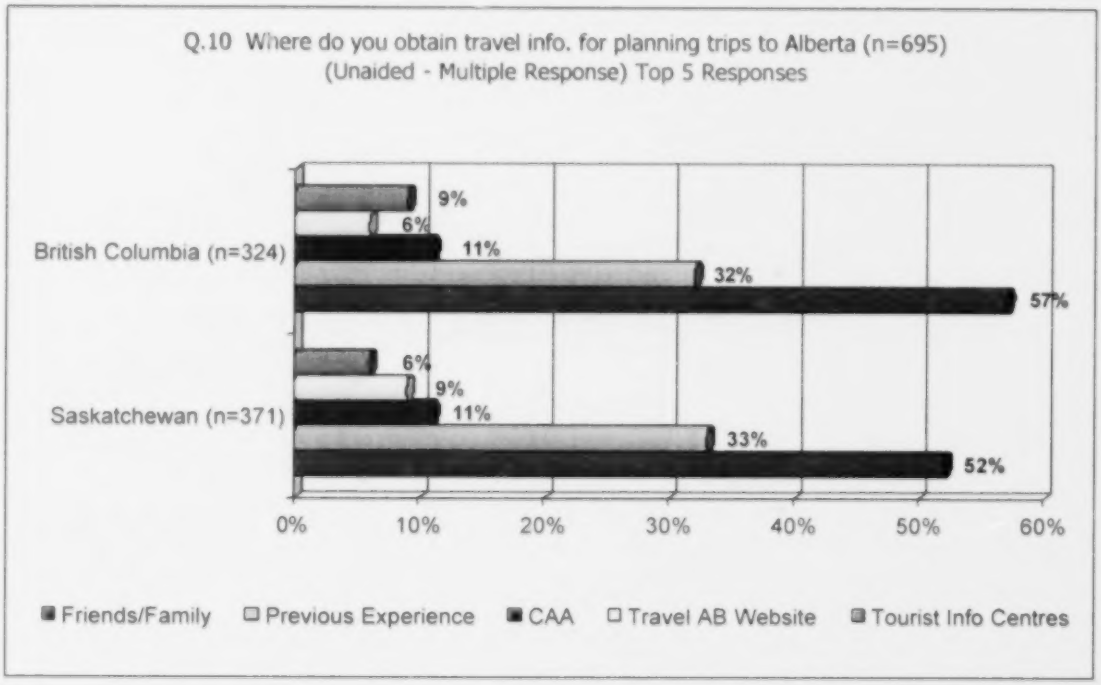
Travel Information Source

When asked about information sources they rely on when planning trips to Alberta, more than half of respondents from both provinces named *friends, family* or *word-of-mouth* (British Columbia - 57% and Saskatchewan - 52%). Previous experience is also mentioned as a reliable source.

The CAA (BC or SK) is cited as a source of travel information equally by respondents from both British Columbia and Saskatchewan (11%).

While six percent (6%) of British Columbia respondents named the Travel Alberta website as a source and nine percent (9%) named Tourist information centres, the reverse is true of Saskatchewan respondents (Travel AB website–9%, Tourist Information Centre–6%). In both provinces this is the least relied on source. (Figure 10 below)

Figure 10



Few differences exist when it comes to the typical choice of accommodations for weekend trips. The majority of respondents from both provinces reported a preference for staying with friends and relatives for both weekend trips and trips of a week or more n length (43% to 53%). This is followed by Hotel/Motel accommodations (28% to 36%), camper/5th wheel (4% to 15%) and tent or tent trailers (3% to 6%). (Figure 11)

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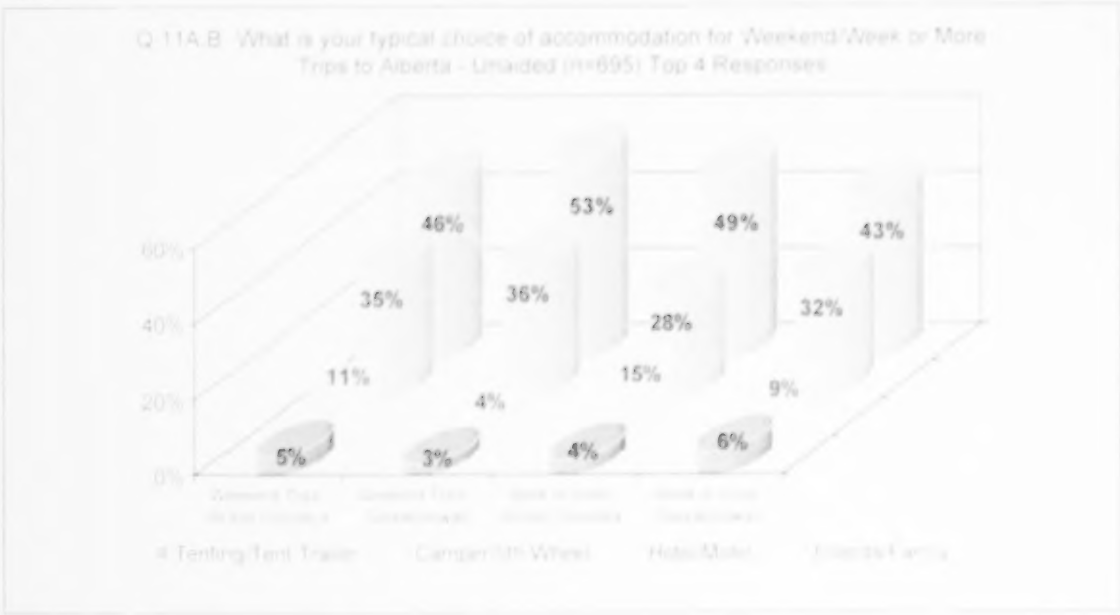

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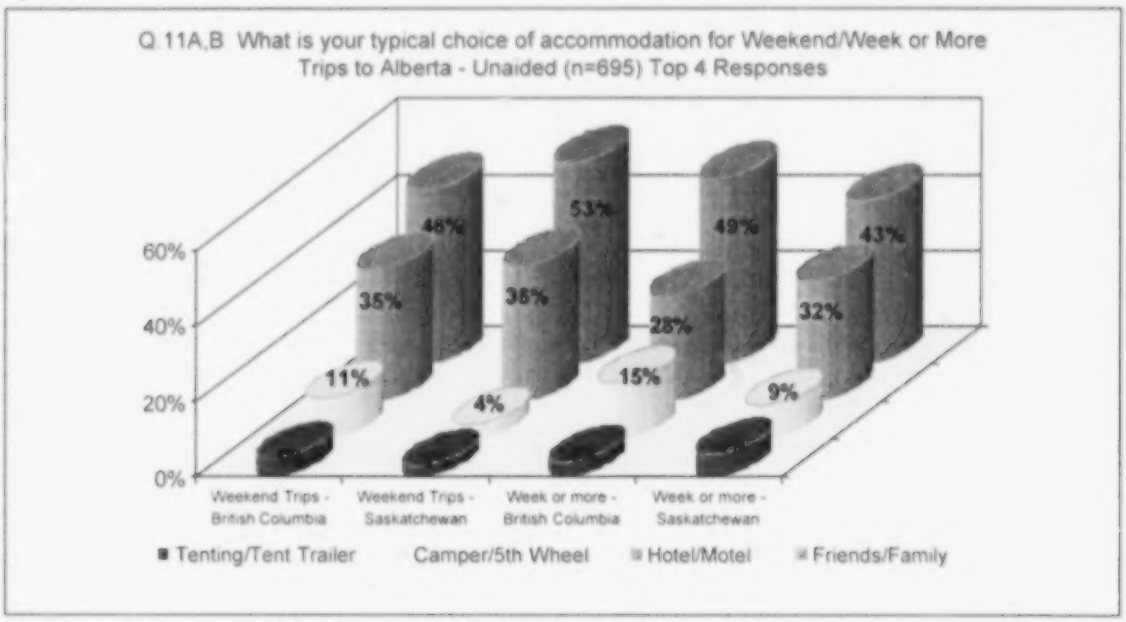


Advertising Recall

Respondents were asked if they recalled seeing, hearing or reading any advertising about travel in Alberta in the previous two to three months.

The highest recall was reported by respondents from Saskatchewan (41%) compared to British Columbia (28%). The specific details of the advertising that was recalled by respondents overall is detailed in Table 6 below.

Table 6

Q.12B Please describe the advertising...(Multiple Response) (Unaided)(n=245) Top 6 responses per category							
Media Source		**Destinations**		**Activities**		**Sponsor**	
TV	20.8%	Calgary & area	18.0%	Calgary Stampede	7.8%	Travel Alberta	6.9%
Brochures	17.1%	Edm. & Area	15.5%	Activities in general	6.5%	Calgary Stampede	5.7%
Newspapers	13.9%	Can. Rockies	8.6%	Shopping	4.5%	AMA/BCAA/ CAA Sask.	3.7%
Other magazine	6.5%	Alberta South	4.9%	Sight-seeing	3.7%	West Ed. Mall	2.9%
Flyers	5.3%	Alberta Central	2.0%	Events in general	2.9%	West Jet	2.0%
Tradeshow/ CAA Magazine	3.7%	Alberta North	0.4%	Golf	1.6%	Cal/Edm Tourism	0.4% each
Do not recall	**31.8%**	**Do not recall**	**46.1%**	**Do not recall**	**71.8%**	**Do not recall**	**77.6%**

Global Events

Less than 10% of all respondents (or 122 respondents in total) indicated that their travel plans for the next six months had been impacted by recent global events. British Columbia respondents were slightly more likely to say they had been impacted by recent global events (10%) than Saskatchewan respondents (7%).

Respondents from Saskatchewan who said they were impacted named SARS the most often (67%) as a key factor, while British Columbia respondents were the most impacted by 9/11 or terrorism in general. When asked to identify in particular the events that had an impact on their plans, the following was reported: (Table 7 on the following page)

- Respondents from British Columbia were impacted equally by SARS (50%) and the war in Iraq (50%).
- Thirty-eight percent of Saskatchewan respondents named the war in Iraq (38%) followed by 9/11 events or terrorism in general (29%).
- Nineteen percent of British Columbia respondents were impacted by the West Nile Virus (19%) and fuel prices (19%).
- Nine percent (9%) or less of both British Columbia and Saskatchewan respondents said they were impacted by airline restructuring or 'other' events. While 19% of Saskatchewan respondents were impacted by the fuel prices and the West Nile Virus, respondents from British Columbia were less impacted (14% and 12%). Other events

that were slightly mentioned include Mad Cow disease (3 respondents from British Columbia) or "All of the above" (1 respondent from Saskatchewan).

When asked how these events had impacted their travel plans, 19% in British Columbia and 21% in Saskatchewan respondents said they are *"staying closer to home"*, while 13% of respondents from both provinces are *"taking fewer trips this year"*. Another 22% of British Columbia respondents are *"not flying this year – only driving"*, while a smaller 8% of Saskatchewan respondents mentioned this factor.

Others indicated that global events had impacted them when it came to planning long distance and travel to Toronto, or international travel to the USA, or to Asia. Some reported that they had completely cancelled their travel plans. Yet, others noted that recent global events had resulted in them becoming more careful, but they are not concerned enough to change their travel plans. On a different note, one respondent indicated that recent events have resulted in more travel for their household due to the lower cost of travel. (See Table 8)

Table 7

Q.13A Have any global events made an impact on your travel plans for the next 6 months?	Overall (N=695)	British Columbia n=324	Saskatchewan n=371
Yes	8.1%	9.9%	6.5%
Q.13B Which events in particular have made an impact? (Aided - Multiple Response)	**Overall (N=56)**	**British Columbia n=324**	**Saskatchewan n=371**
SARS	57.1%	50.0%	66.7%
War in Iraq	44.6%	50.0%	37.5%
9/11 Terrorism in general	42.9%	53.1%	29.2%
West Nile Virus	12.5%	18.8%	4.2%
Airline Restructuring	8.9%	9.4%	8.3%
Fuel Prices	14.3%	18.8%	8.3%
Other	7.1%	9.4%	4.2%
▸ Mad Cow Disease	(3)	(3)	
▸ All of the above	(1)		(1)

Table 8

Q.14 How have these event(s) impacted your travel plans for the next 6 months (Unaided - Multiple Response)	Overall (N=56)	British Columbia n=324	Saskatchewan n=371
Staying close to home – in BC/SK	19.6%	18.8%	20.8%
Not flying – only driving	16.1%	21.9%	8.3%
Taking fewer trips	12.5%	12.5%	12.5%
Other	62.5%	62.5%	62.5%
▸ Delayed/Cancelled plans	(9)	(8)	(1)
▸ Not traveling to Toronto	(8)	(1)	(7)
▸ Being careful but still traveling	(5)	(5)	
▸ Not traveling Internationally	(5)	(3)	(2)
▸ Not traveling to the US	(5)	(1)	(4)
▸ Not traveling to Asia	(2)	(1)	(1)
▸ Traveling more - lower cost	(1)	(1)	

Demographics – Table 9

Household Composition	Overall N=1,401	British Columbia (n=801)	Saskatchewan (n=600)
Single Parent with Children	6.1%	7.1%	4.7%
Single Adult No Children	16.7%	16.7%	16.7%
2 Adults with Children	38.2%	37.5%	39.2%
2 Adults No Children	36.2%	36.0%	36.5%
3 or more Adults No Children	1.3%	1.4%	1.2%
3 or more Adults with Children	0.6%	0.5%	0.7%
Refused	1.0%	0.9%	1.2%
Age	**Overall N=1,401**	**British Columbia (n=801)**	**Saskatchewan (n=600)**
18 to 24 years	9.6%	7.7%	12.0%
25 to 34 years	15.8%	14.7%	17.2%
35 to 44 years	21.6%	21.1%	22.3%
45 to 54 years	18.3%	19.0%	17.3%
55 to 64 years	14.4%	16.2%	12.0%
65 years or older	15.8%	15.7%	15.8%
Refused	4.6%	5.5%	3.3%
Income	**Overall N=1,401**	**British Columbia (n=801)**	**Saskatchewan (n=600)**
Less than $25,000	11.2%	11.0%	11.5%
$25,000 to $49,999	27.5%	29.3%	25.0%
$50,000 to $99,999	30.0%	29.5%	30.8%
$100,000 and over	10.1%	10.6%	9.5%
Don't know	3.4%	3.1%	3.7%
Refused	17.8%	16.5%	19.5%
Are you currently a BCAA/SASK CAA Member?	**Overall N=1,401**	**British Columbia (n=801)**	**Saskatchewan (n=600)**
Yes	40.0%	40.9%	38.8%
No	58.4%	57.4%	59.7%
Don't know/Refused	1.6%	1.6%	1.5%
Gender	**Overall N=1,401**	**British Columbia (n=801)**	**Saskatchewan (n=600)**
Male	41.0%	42.8%	38.5%
Female	59.0%	57.2%	61.5%

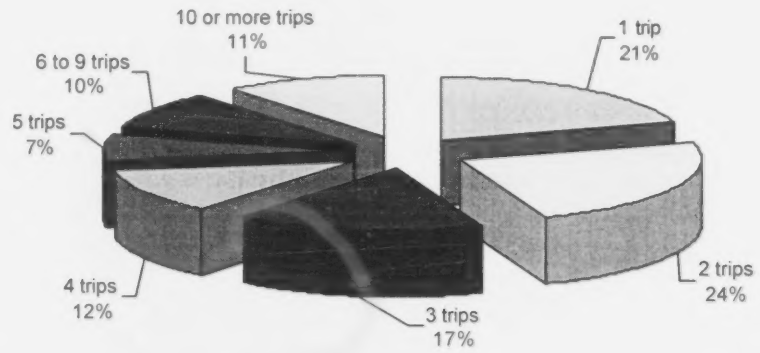
4.0 British Columbia Respondent Profile

Number of Trips over next Six Months

The number of intended trips over the next six months ranged from one (1) to 60 trips, with British Columbia respondents averaging 4.2 trips. The number of respondents taking between one (1) to five (5) trips is slightly skewed towards taking fewer trips, with less than a quarter of British Columbia respondents planning to take one trip (21%), two trips (24%), three trips (17%), four trips (12%) or five trips (7%). Ten percent of these respondents plan on taking between six and nine trips over the next six months, while the remaining 11% of respondents intend to take 10 or more trips over the next six months. (Figure 12 below)

Figure 12

Q.1 How many leisure trips does your household plan to take between June 1 and Nov. 30, 2003? - British Columbia Respondents (n=801)



When asked about their plans to travel within their home Province, 17% %) of British Columbia respondents indicated they have ***no*** travel plans for the next six months, not even within their own province. Of the 83% who are planning to take trips within their home province over the next six months, 26% are planning one trip, 22% are planning two trips, and 13% are planning three trips. The remaining 22% are planning four and more trips.

A majority of British Columbia respondents (60%) have no plans to travel to Alberta on a leisure trip over the next six months. Of the 40% of British Columbia respondents who do plan to travel to Alberta on a leisure trip, 28% are planning one (1) trip and a much smaller 7% are planning two (2) trips. The remaining 5% are planning to make from three (3) to 24 trips to Alberta over the next six months. (See Figures 13 & 14 on the following page)

Figure 13
Q.2 How many of these trips will be within British Columbia? British Columbia Respondents (N=801)

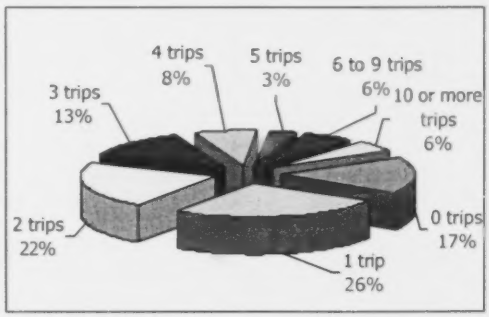
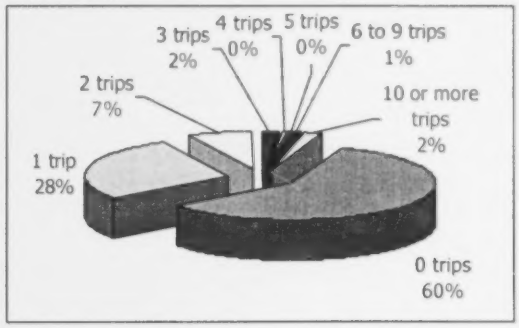


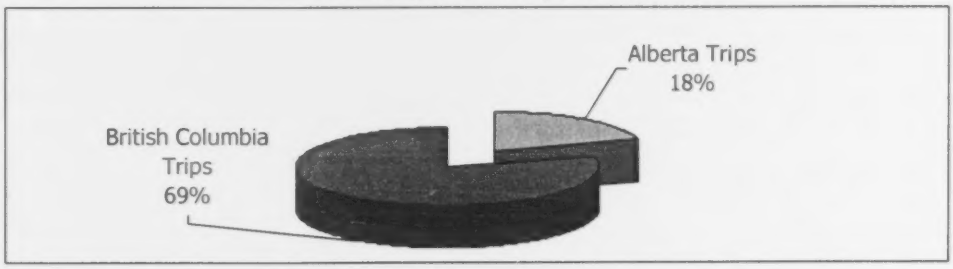
Figure 14
Q.3 How many of these trips will be to Alberta? British Columbia Respondents (N=801)



Destinations

Of the 3,371 trips planned by British Columbia respondents, sixty-nine percent (69%) trips are to destinations within their own province, while 18% are planned for destinations in Alberta. (Figure 15 below)

Figure 15 Percentage of Total Trips Planned by Destination
British Columbia Respondents



British Columbia respondents who are not planning any leisure trips to Alberta in the next six months indicated:

- Thirty (30%) have "no interest in traveling to Alberta", or they "prefer destinations outside of Alberta"
- 11% have been to Alberta recently
- Ten percent (10%) are staying close to home this year
- Too busy over the next 6-months to make a trip to Alberta (9%)

Other reasons for not taking a leisure trip to Alberta include 18% of respondents who have "no particular reason for not visiting Alberta", while 15% of respondents said they have "no relatives living in Alberta, so no reason to go". Other reasons given for not planning to travel in Alberta are detailed in Table 10 on the following page.

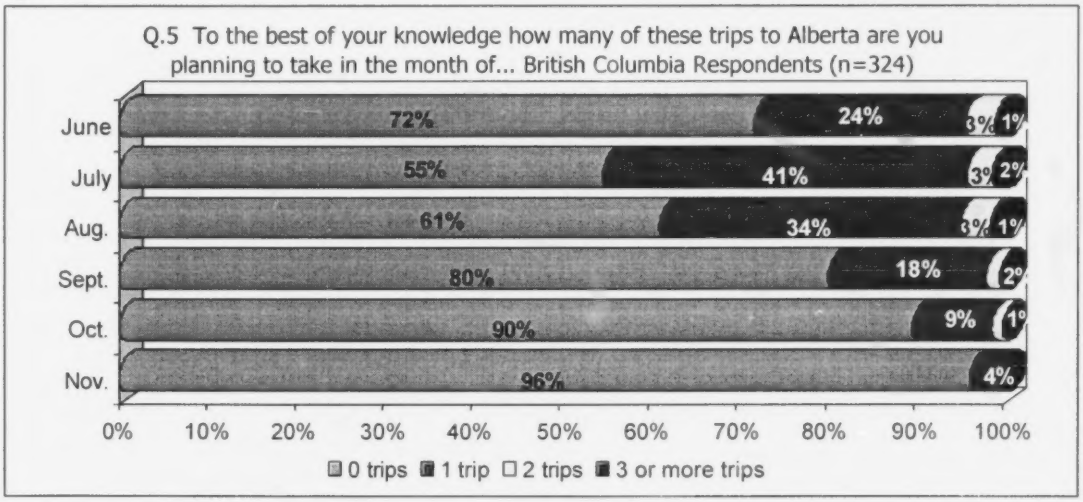
Table 10

Q.4 Is there any particular reason why you do not intend to take any leisure trips to Alberta within the next 6 months (Multiple Response) (Unaided)	British Columbia Respondents n=477
No interest/prefer destinations other than Alberta	29.8%
Have been to Alberta recently, won't go again in the next 6 months	11.1%
Staying close to home this year	9.6%
No time – too busy	8.6%
No money – financial	5.5%
Not aware of leisure vacation opportunities in Alberta	2.7%
The weather	0.8%
Other;	(44.4%)
• No particular reason	17.8%
• No relatives living in Alberta, so no reason to go	14.9%
• Nothing special in AB that BC/SK doesn't have	3.4%
• Going on other long/international trips this year	3.1%
• Alberta is too far to travel	2.7%
• Vacation property located outside of Alberta	0.6%
• Working too much – can't get away	0.6%
• Alberta is too expensive	0.4%
• Mad Cow disease	0.2%

Alberta Travelers (n=324)

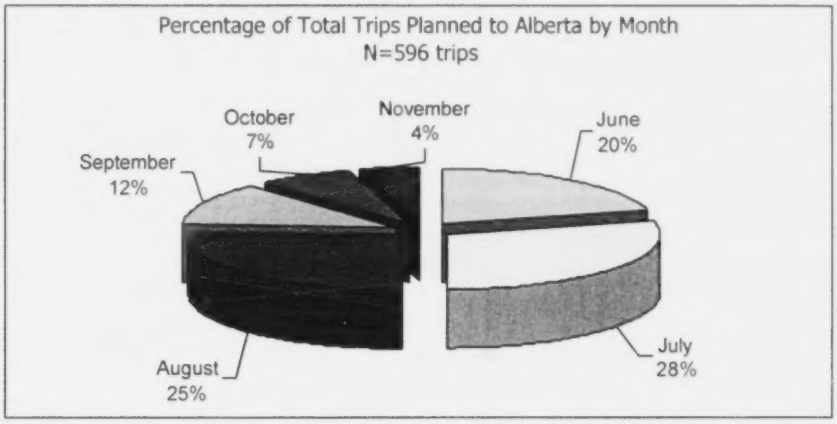
When asked to indicate the specific months they will be taking trips in Alberta, just over half (54%) indicated they are planning one or more trips in July, and/or a smaller 39% will take one or more trips in August. Another 28% of respondents are planning one or more trips to Alberta during June, while 20% are planning trips in September. Fewer are planning to take trips during October (10%) and November (6%). (Figure 16 below)

Figure 16



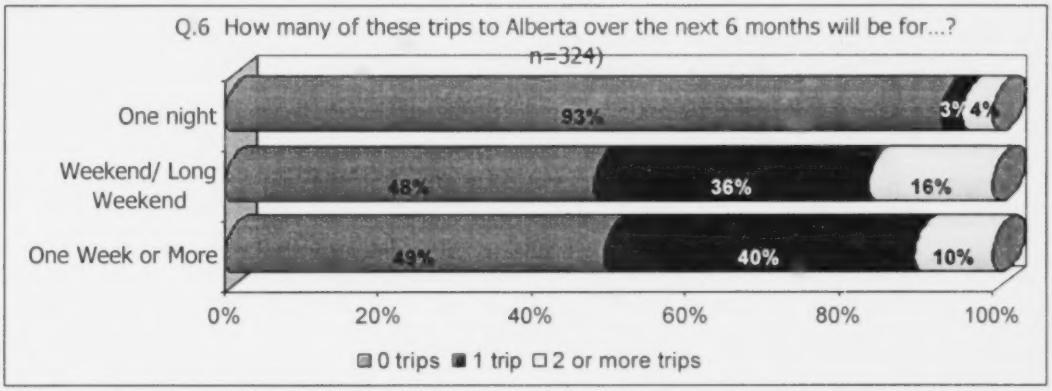
When looking at the specific months of travel for the 596 trips that are planned to Alberta over the next 6 months, the highest number are planned for the months of July (28%) and August (25%). Twenty percent (20%) of trips are planned for June and half that number (12%) are planned for September. Even fewer trips are planned for October (7%) and November (4%). (See Figure 17 below)

Figure 17



Fifty-two (52%) percent of British Columbia respondents intend to make one or more weekend/long weekend trips to Alberta over the next six months, and 50% plan to make one or more trips of one week or more. Less than ten percent (7%) plan to make one overnight trip to Alberta over the next six months. (Figure 18 below)

Figure 18



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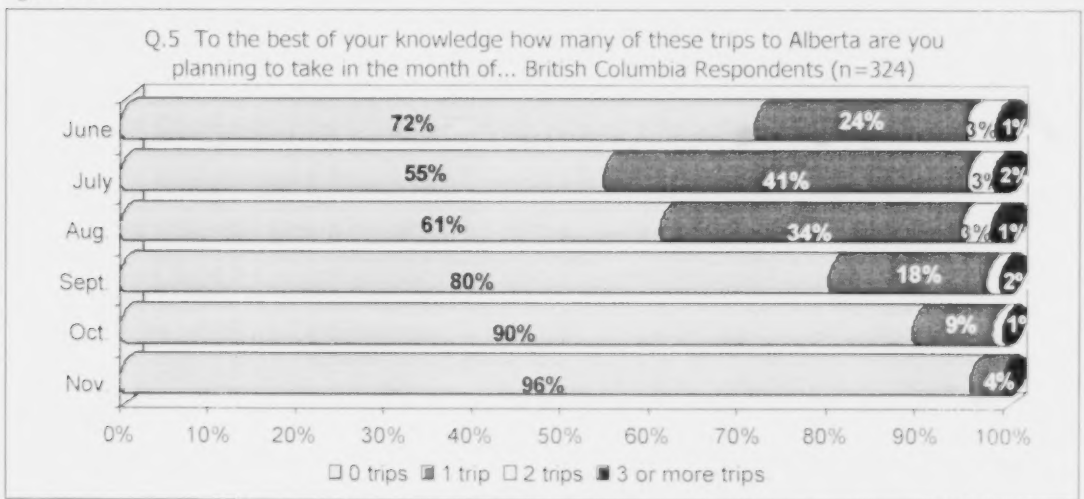

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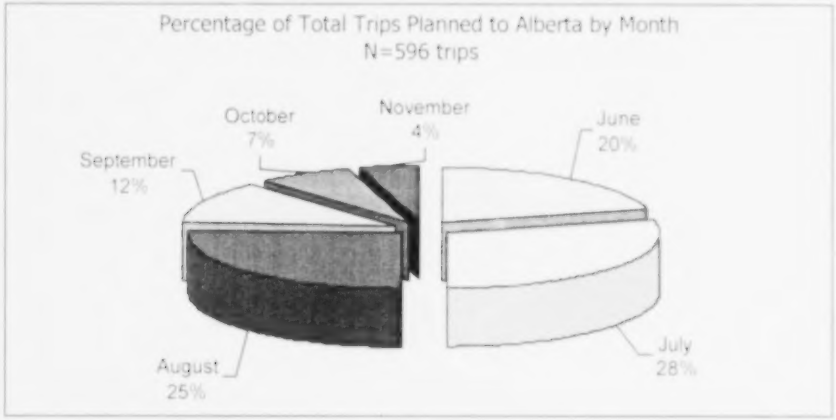

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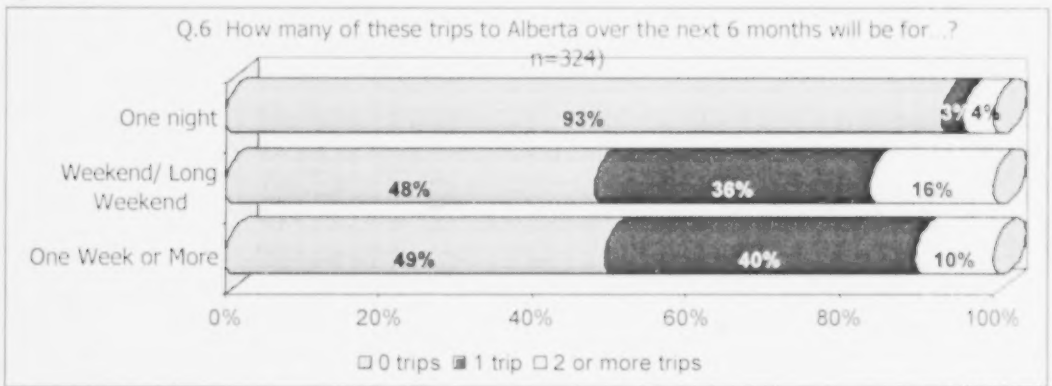
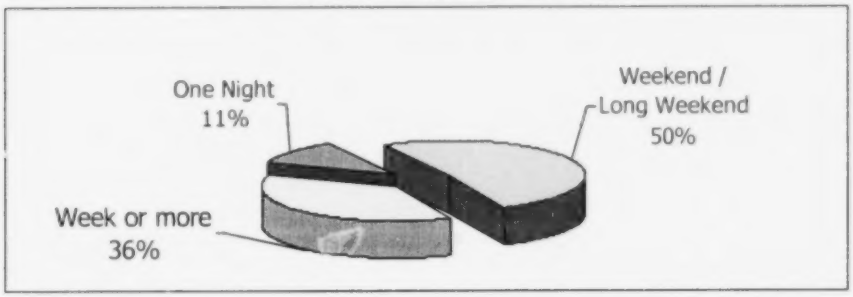


Of the 596 Alberta trips that are planned, half (50%) will be for weekend or long weekend trips, 36% will be for one week or longer (36%), or for one night only (11%). (Figure 19)

Figure 19 Percentage of Total Alberta Trips Planned by Trip Length
British Columbia Respondents (n=324)



For this group of respondents, a very broad range of days, from less than 1 day to 200 days, are typically required to plan weekend trips, while one day to one year is required for planning trips of one week or longer. The average number of days (25.5 days) that are required to plan weekend trips to Alberta is slightly more than half the time required to plan Alberta trips of one week or more (50.3 days). The most typical planning time for both weekend trips, or trips of one week or longer, to Alberta is 30 days (weekend - 19%, week or longer - 26%). (See Table 11 below)

Table 11

Q.7 How many days in advance do you typically plan leisure trips to Alberta for...	Range	Mean	Mode	Not Applicable*
A. Weekend trips (n=293)	0 to 200	25.5 days	30 days (18.8%)	n=31
B. Trips of one week or longer (n=290)	0 to 365	50.3 days	30 days (25.6%)	n=34

**These respondents indicated they do not typically take trips of this length when traveling to Alberta*

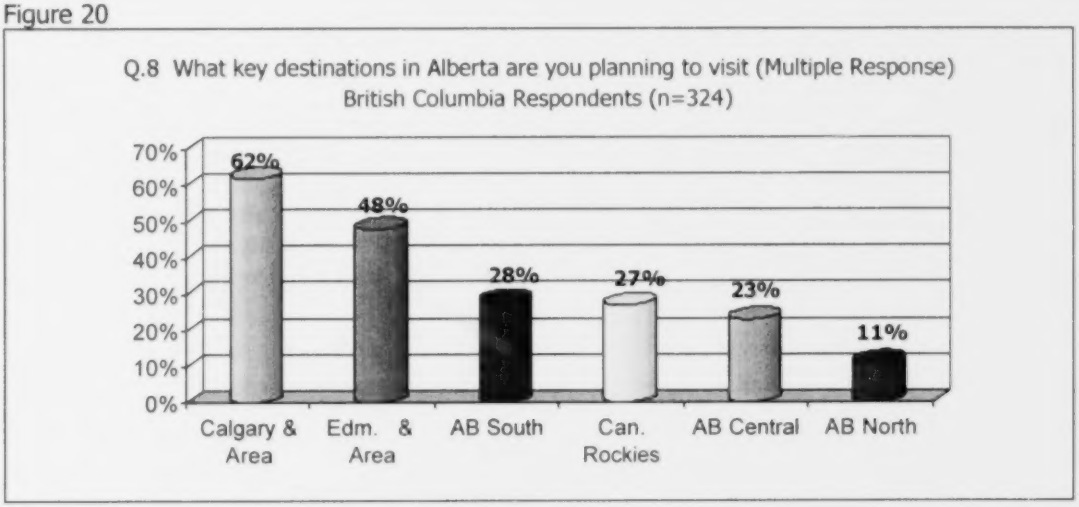
Destinations

Key destinations in Alberta that these respondents plan to visit over the next six months include:

- 62% plan to travel to Calgary & Area
- 48% plan to travel to Edmonton & Area
- 28% plan to travel to Alberta South
- 27% plan to travel to the Canadian Rockies region
- 23% plan to travel to Alberta Central
- A smaller 11% plan to travel to the 1Alberta North

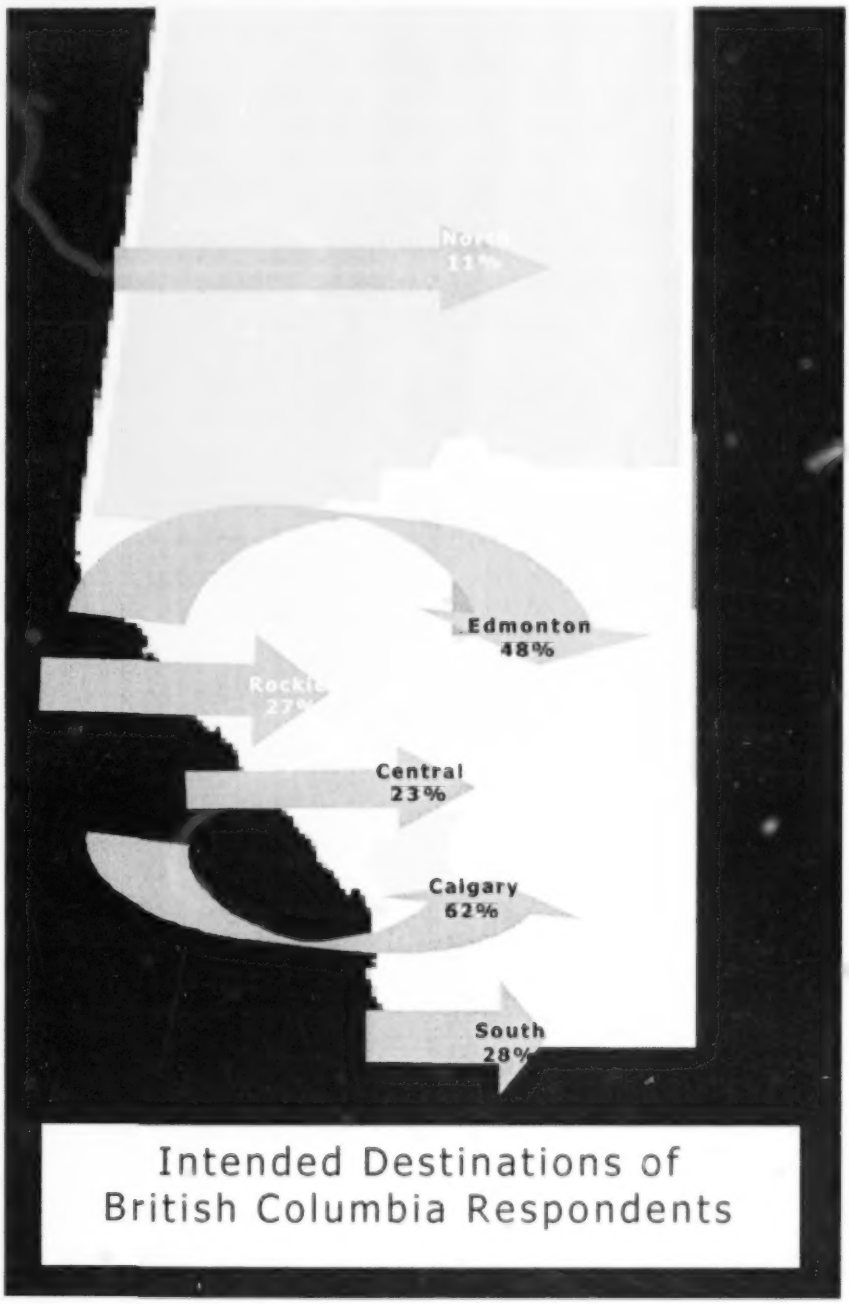
(See Figure 20 below)

Figure 20



(A Flow Map depicting the planned travel from British Columbia is noted as Figure 21 below)

Figure 21 – Flow Map of British Columbia Respondents Intended Destinations*
**Please note that these results do not take into account the frequency of planned visits to each key destination*



Activities

All respondents who said they are planning a leisure trip to Alberta over the next six months were asked to indicate how likely they are to participate in a variety of activities while on their trip. A majority of 79% indicated they would be very likely to *Visit family and friends*, for a mean of 3.7 out of 4.

Two of the remaining sixteen activities that were identified by a majority of British Columbia respondents as being activities they would also be *very likely* to participate in include: Indoor Leisure Activities (47%) (Mean=3.1 out of 4) and Outdoor Leisure Activities (44%) (Mean = 3.1 out of 4).

Five activity types, with a mean ranging from 2.6 to 2.2, include activities that British Columbia respondents indicated they were more likely to participate in than not, while on a trip in Alberta. These include: Museums & Historical Sites (2.6 out of 4), Outdoor Summer Sports (2.6 out of 4), Attractions (2.5 out of 4), Outdoor Recreation (2.5 out of 4) and Festivals & Cultural Activities (2.2 out of 4).

The least popular activities that respondents are *very unlikely* to participate in include: the Calgary Stampede/Klondike Days (1.9 out of 4), Spectator Sports & Entertainment (1.8 out of 4), Aboriginal Attractions (1.7 out of 4), Organized Sports Events (1.6 out of 4), Team Sports (1.5 out of 4), Outdoor Winter Sports (1.5 out of 4), Spas and Other Health Club Activities (1.5 out of 4) and Outdoor Adventure activities (1.4 out of 4). (See Table 12 below)

Table 12

Q.9 Activities British Columbia Respondents (n=324)	Likelihood of Participating in...					Mean
	Very Unlikely	Somewhat Unlikely	Somewhat Likely	Very Likely	Don't Know	
Visit Friends & Relatives	7.1%	0.6%	12.7%	79.3%	0.3%	3.7
Indoor Leisure Activities	14.5%	5.6%	32.4%	46.9%	0.6%	3.1
Outdoor Leisure	14.2%	6.2%	34.6%	44.4%	0.6%	3.1
Museums & Historical Sites	28.7%	11.4%	28.4%	30.9%	0.6%	2.6
Outdoor Summer Sports	34.3%	7.4%	26.2%	31.8%	0.3%	2.6
Attractions	35.2%	11.4%	22.8%	29.0%	1.5%	2.5
Outdoor Recreation	41.7%	5.2%	17.6%	34.6%	0.9%	2.5
Festivals & Cultural Activities	41.4%	14.8%	30.9%	12.7%	0.3%	2.2
Calgary Stampede/ Klondike Days	55.9%	12.7%	16.7%	14.5%	0.3%	1.9
Spectator Sports & Entertainment	59.3%	13.3%	15.1%	11.4%	0.9%	1.8
Aboriginal Attractions	60.5%	14.8%	17.0%	6.8%	0.9%	1.7
Organized Sports Events	68.5%	11.4%	12.0%	6.8%	1.2%	1.6
Team Sports	73.1%	10.2%	9.3%	6.8%	0.6%	1.5
Outdoor Winter Sports	74.4%	10.5%	8.0%	6.8%	0.3%	1.5
Spas & Other Health Club	69.4%	13.3%	10.2%	6.2%	0.9%	1.5
Outdoor Adventure	75.3%	9.6%	9.6%	4.9%	0.6%	1.4

The information source most likely to be relied on for planning leisure trips to Alberta is *friends, family or word-of-mouth* (57%). One-third (32%) rely on their previous experiences, and another 11% rely on BCAA as a source for Alberta travel information. Slightly over a quarter (28%) of respondents named a variety of 'other sources' including: the Internet in general, travel agents, books, or use no source of information. Some 9% use Tourist Information Centres while 6% utilize the Travel Alberta website as a source. (Figure 22)

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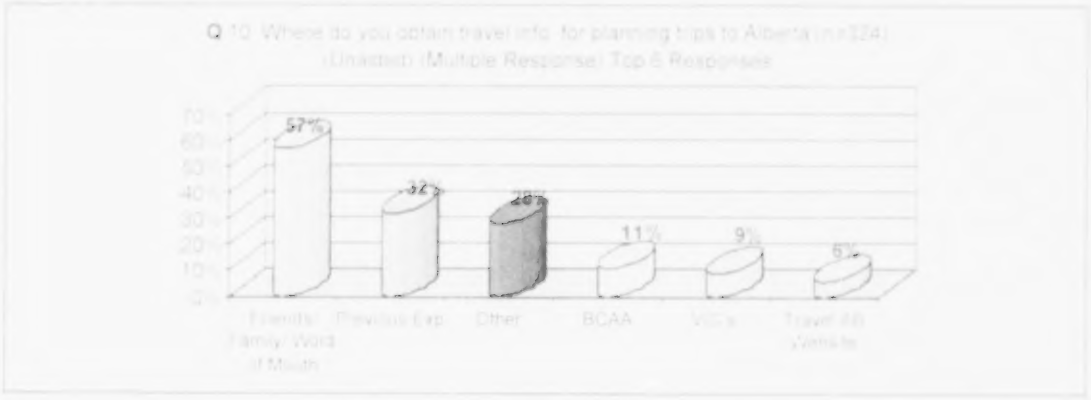
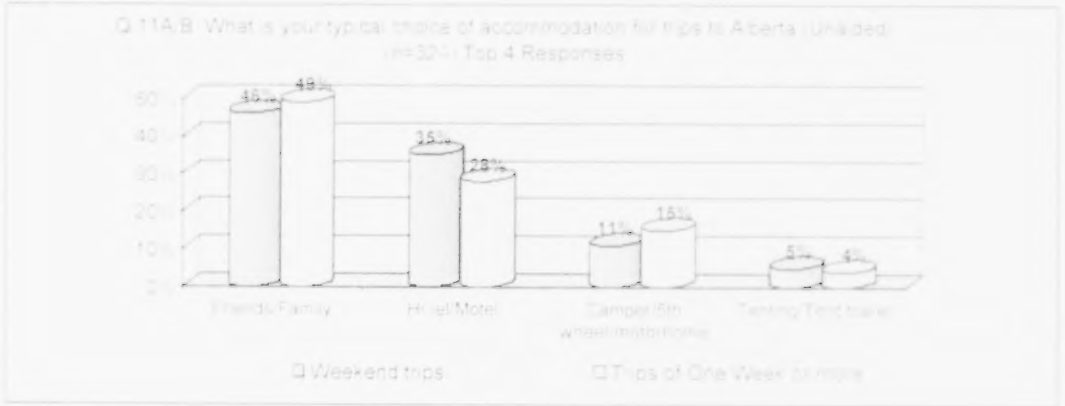


Accommodations

Few differences were noted when it came to their typical choice of accommodations for either a weekend trip, or trips of one week or longer to Alberta. Half of British Columbia respondents will stay with friends or family on weekend trips (46%) or on one week or longer trips (49%). Another one-third said they would stay in a hotel or motel on weekend trips (35%) or when on one week or longer trips (28%). More respondents use a Camper/5th wheel or Motorhome on trips of one week or longer (15%) compared to a weekend trip (11%). Little differences were noted for those who choose to use a tent or tent trailer regardless of the length of stay. (See Figure 23 below)

Figure 23



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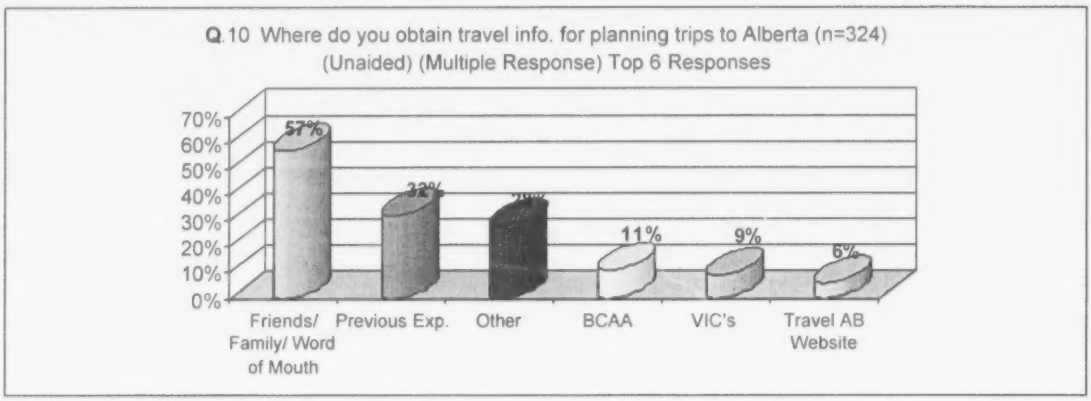

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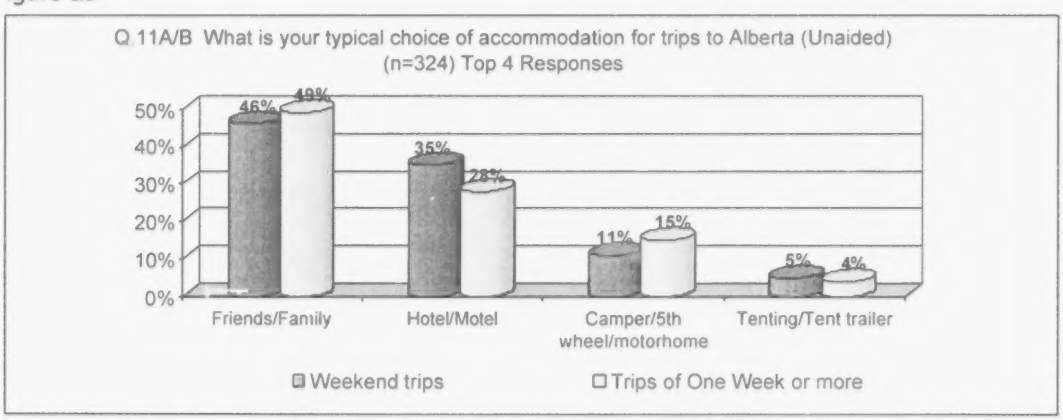


Advertising Recall

British Columbia respondents who are planning a leisure trip to Alberta over the next six months were asked if they could recall seeing, hearing or reading any advertising about travel to Alberta over the past two to three months. Just over a quarter (28%) indicated they did recall travel advertising. However, when asked to describe the advertising the response was limited.

The media sources most frequently recalled was television (25%), brochures (14%) and newspapers (12%).

Destination advertising recalled by respondents was coded into the Tourism Destination Regions (TDR). The most frequently recalled destinations were located in the Calgary & Area region (24%), followed by Edmonton & Area (19%), and Canadian Rockies destinations (12%). Alberta South (9%) and Alberta Central (3%) destinations were recalled by a smaller number of respondents.

When asked to provide more specific details of the advertising, few could recall any content. The most frequently recall included the Calgary Stampede (11%), shopping (5%), sight-seeing (5%), activities in general (4%), hotels or motels (3%) or events in general (3%).

Travel Alberta and the Calgary Stampede was mentioned the most frequently (9%) as the sponsor of the advertising, followed by the AMA/BCAA (5%). West Edmonton Mall (3%) and West Jet (3%) were also identified by respondents as being sponsors of various ads. (See Table 13 below)

Table 13

Q.12B Please describe the advertising...(Multiple Response) (Unaided) British Columbia Respondents (n=92) Top 6 responses per category							
Media Source		**Destinations**		**Activities**		**Sponsor**	
TV	25.0%	Calgary & area	23.9%	Calgary Stampede	10.9%	Travel Alberta	8.7%
Brochures	14.1%	Edm. & Area	18.5%	Shopping	5.4%	Calgary Stampede	8.7%
Newspapers	12.0%	Can. Rockies	12.0%	Sight-seeing	5.4%	AMA/BCAA	5.4%
Other magazine	9.8%	Alberta South	8.7%	Activities in general	4.3%	West Ed. Mall	3.3%
BCAA magazine	5.4%	Alberta Central	3.3%	Hotel/ Motel	3.3%	West Jet	3.3%
Tradeshow/ Flyers	3.3%	Alberta North	0	Events in general	2.2%	Zip airlines	1.1%
Do not recall	**27.1%**	**Do not recall**	**34.8%**	**Do not recall**	**68.5%**	**Do not recall**	**69.6%**

Global Events

A small 10%, or 32 British Columbia respondents, indicated their travel plans for the next six months have been impacted by recent global events. Of those, the most frequently mentioned event was the 911 events or terrorism in general (53%), followed by the SARS outbreak (50%), and the war in Iraq (50%). The West Nile Virus (19%), fuel prices (19%), airline restructuring (9%) or 'other' global events (Mad Cow Disease) was mentioned by fewer respondents. (See Table 24)

When asked how these events impacted their travel plans, almost a quarter said they *"are not flying, only driving"* (22%) or *"are staying close to home, in BC"* (19%). Thirteen percent indicated they are taking fewer trips overall. A variety of "other" reasons are listed in Table 6. One respondent indicated that the lower cost of travel due to recent events has resulted in more travel for their household.

Other less important reasons include: not traveling to Toronto, not traveling internationally to the USS or Asia; or, they have delayed or cancelled their travel plans all together. They are being more careful in their travel, but not enough to change their travel plans. One respondent indicated that the lower cost of travel due to recent events has resulted in more travel for their household. (Table 14 below)

Table 14

Q.13A Have any global events made an impact on your travel plans for the next 6 months?			
Yes	9.9%	No	89.8%
Q.13B Which events in particular had an impact? (Multiple Response) (Aided) British Columbia Respondents (n=32)		**Q.14 How have this/these event(s) impacted your travel plans for the next 6 months (Multiple response) (Unaided) British Columbia Respondents (n=32)**	
9/11 Terrorism in general	53.1%	Not flying – only driving	21.9%
War in Iraq	50.0%	Staying close to home in BC	18.8%
SARS	50.0%	Taking fewer trips	12.5%
Fuel prices	18.8%	Other;	62.5%
West Nile Virus	18.8%	• Delayed/cancelled plans	(8)
Airline restructuring	9.4%	• Being careful but still traveling	(5)
Other	9.4% (3)	• Not traveling Internationally	(3)
• Mad Cow Disease	(3)	• Not traveling to Toronto	(1)
		• Not traveling to the US	(1)
		• Not traveling to Asia	(1)
		• Traveling more (lower cost)	(1)

Demographics – Table 15

Q.15 Family Composition	
Single Parent with Children	7.1%
Single Adult Household	16.7%
2 Adults with Children	37.5%
2 Adults without Children	36.0%
3 or more Single Adults without children	1.4%
3 or more Single Adults with Children	0.5%
Refused	0.9%

Q.16 Age	
18 to 24 years	7.7%
25 to 34 years	14.7%
35 to 44 years	21.1%
45 to 54 years	19.0%
55 to 64 years	16.2%
65 or older	15.7%
Refused	4.6%

Q.17 Income	
Less than $25,000	11.0%
$25,000 to $49,999	29.3%
$50,000 to $99,999	29.5%
$100,000 and over	10.6%
Refused	19.6%

Q.18 Are you currently a BCAA member?	
Yes	40.9%
No	57.4%
Don't Know	1.1%
Refused	0.5%

Q.19 Gender	
Male	42.8%
Female	57.2%

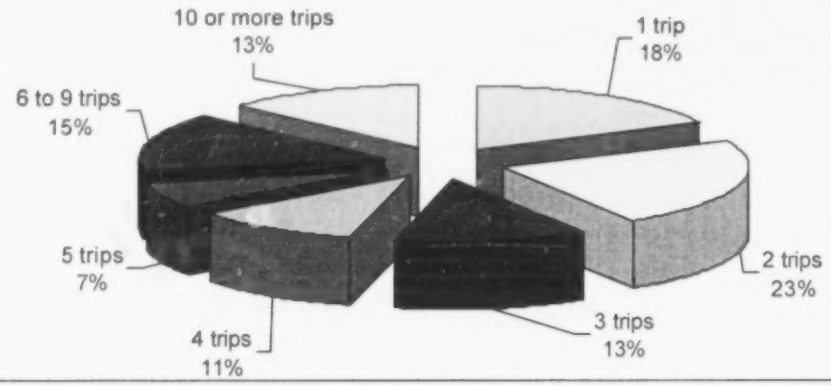
5.0 Saskatchewan Respondent Profile

Number of Trips over next Six Months

The number of intended trips over the next six months range from one (1) to 32 trips, with Saskatchewan respondents averaging 4.9 trips. The number of respondents taking between one (1) to five (5) trips in the next six months is slightly skewed towards taking fewer trips, with one quarter or less of Saskatchewan respondents planning to take one trip (18%), two trips (23%), three trips (13%), four trips (11%) or five trips (7%). Fifteen percent (15%) of these respondents plan on taking between six and nine trips over the next six months, while the remaining 13% intend to take 10 or more trips. (Figure 24 below)

Figure 24

Q.1 How many leisure trips does your household plan to take between June 1 and Nov. 30, 2003? (n=600)



When asked about their plans to travel within their home Province, more than one-quarter (27%) of Saskatchewan respondents indicated they have no plans to travel over the next six months. Of the 73% who are planning to take trips within their home province over the next six months, 19% are planning one trip, and 18% are planning two trips. A much smaller 8% are planning three trips. The remaining 28% are planning four and more trips over the next six months.

Over a third of Saskatchewan respondents (38%) *do not* intend to travel to Alberta on a leisure trip over the next six months. Of the 62% of Saskatchewan respondents who are planning to travel to Alberta 36% are planning one (1) trip and 16% are planning two (2) trips. The remaining 11% are planning to take anywhere from three (3) to 15 trips to Alberta over the next six months (Figures 25 & 26 on following page)

Figure 25
Q.2 How many of these trips will be within Saskatchewan? (N=600)

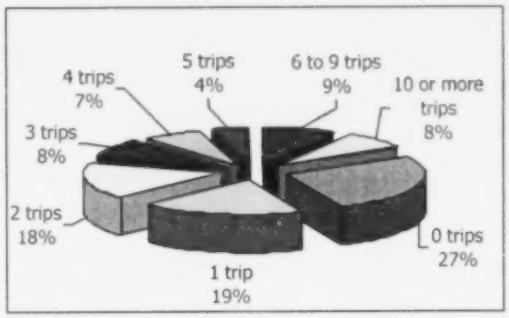
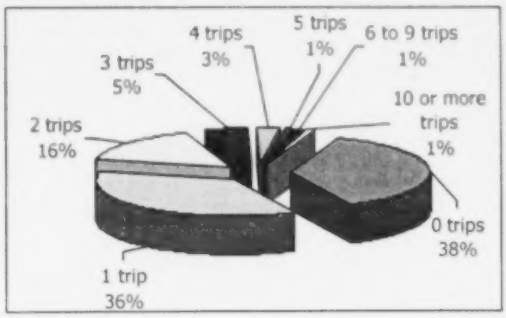


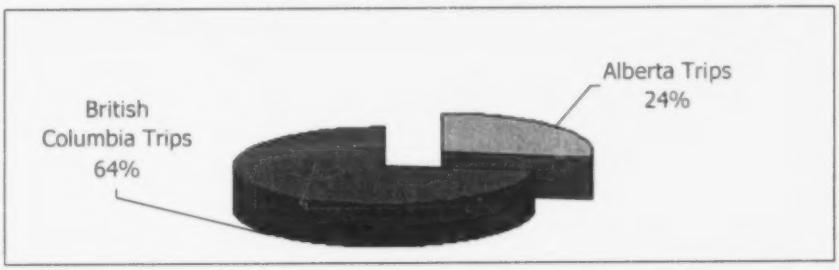
Figure 26
Q.3 How many of these trips will be to Alberta? (N=600)



Destinations

Of the 2,951 trips planned by Saskatchewan respondents for the next six months, sixty-four percent (64%) are to destinations within their own province, while 24% are planned for destinations in Alberta. (Figure 27 below)

Figure 27 Percentage of Total Trips Planned by Destination
Saskatchewan Respondents



Twenty percent (20%) of Saskatchewan respondents who are not planning any leisure trips to Alberta over the next six months indicated they have *"no interest in traveling to Alberta"*, or they *"prefer destinations other than Alberta"*. Seventeen percent (17%) have *"no time - too busy over the next 6 months to make a trip to Alberta"*. Fourteen percent (14%) *"have been to Alberta recently"*, or 7% are *"staying close to home this year"*. Almost a quarter (24%) of respondents who are not planning to travel to Alberta indicated they have *"no particular reason for not visiting Alberta"*, while 11% say they have *"no relatives living in Alberta, and have no reason to visit"*. 'Other' reasons given for not planning travel in Alberta are set out in Table 15 on the following page.

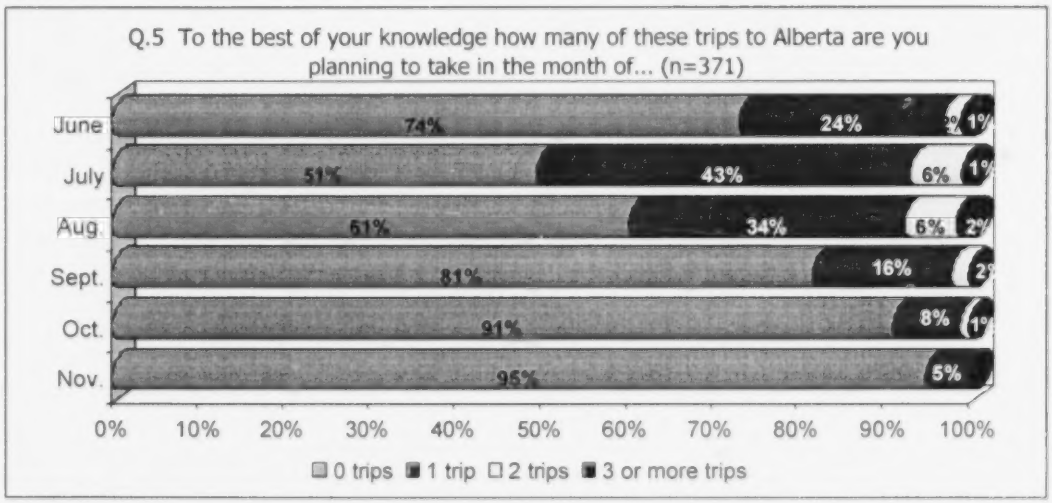
Table 15

Q.4 Is there any particular reason why you do not intend to take any leisure trips to Alberta within the next 6 months (Multiple Response) (Unaided)	Saskatchewan Respondents n=229
No interest/prefer destinations outside Alberta	20.5%
No time – too busy	17.0%
Have been to Alberta recently, won't go again in the next 6 months	13.5%
Staying close to home this year	7.0%
No money – financial	6.6%
The weather	0.4%
Other;	(45.9%)
• No particular reason	24.5%
• No relatives living in Alberta	22.9%
• Nothing special in AB that SK doesn't have	4.8%
• Alberta is too far to travel	3.8%
• Vacation property located outside of Alberta	3.8%
• Going on other long/international trips this year	2.9%
• Working too much – can't get away	2.9%
• Go to Alberta in the Winter	2.9%
• Alberta is too expensive	1.9%

Alberta Travelers (n=371)

Respondents who are planning to make a leisure trip to Alberta were asked to indicate the specific months they would be making these trips. Close to one-half (49%) indicated they are planning one or more trips in July, and/or are planning one or more trips to Alberta during August (40%). Another 26% of respondents are planning one or more trips to Alberta during June, while 19% are planning trips in September. Fewer are planning trips during the months of October (9%) and November (5%). (Figure 28 below)

Figure 28



When looking at the specific months of travel for the 697 Alberta trips planned over the next 6 months, the highest number are planned for the months of July (31%) and August (27%). Sixteen percent (16%) of trips are planned for June and 12% for September. Noticeably fewer trips are planned for October (6%) and November (3%). (Figure 29 below)

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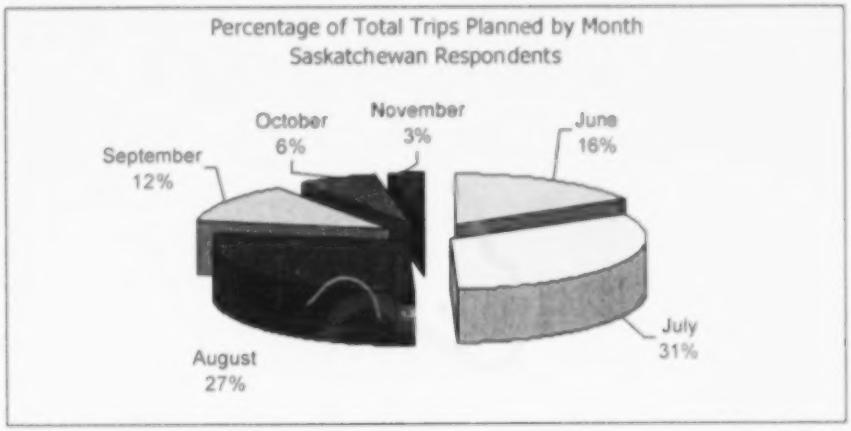

Two-thirds of Saskatchewan respondents (66%) said they plan to make one or more weekend/long weekend trips to Alberta over the next six months, while a smaller 38% plan to make one or more trips of one week or longer. A smaller 7% are planning to take trips for one night, or more than one night, to Alberta over the next six months. (Figure 30 below)

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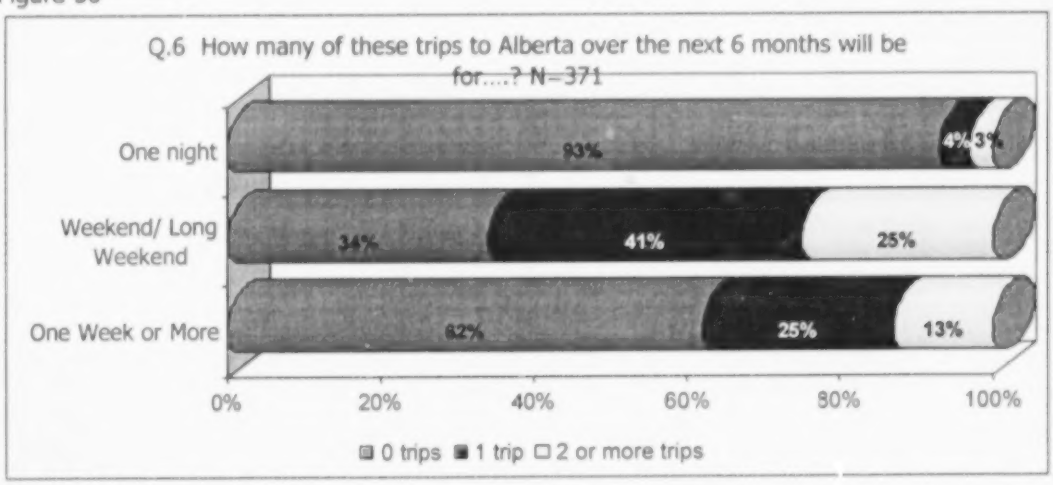

Of the 697 planned Alberta trips more than half (59%) will be for weekends or long weekend trips. The remaining trips will be for one week or longer (30%) or one night only (10%). (See Figure 31 on the following page)

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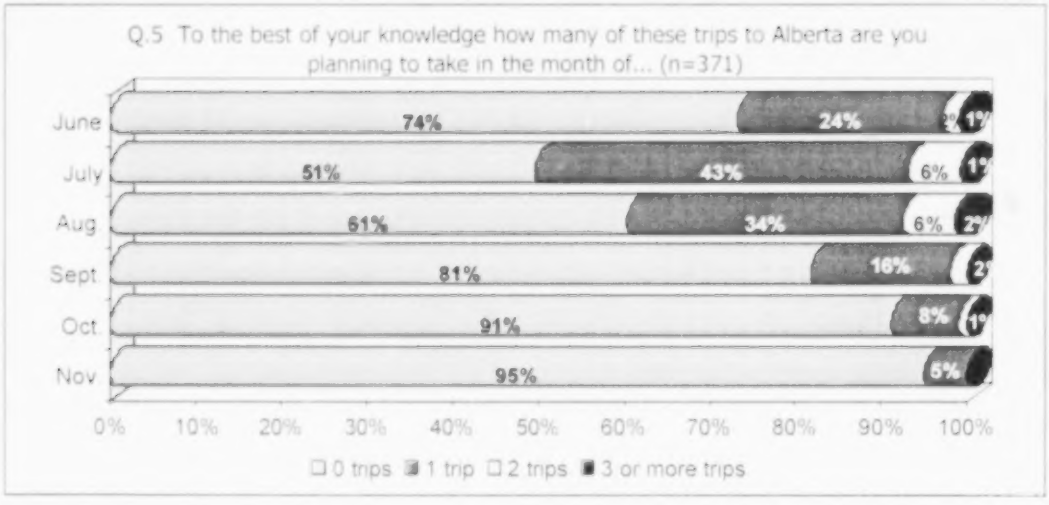

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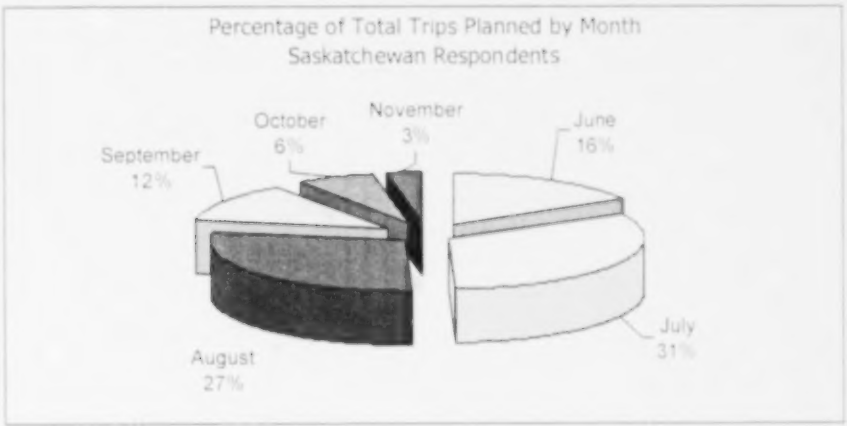

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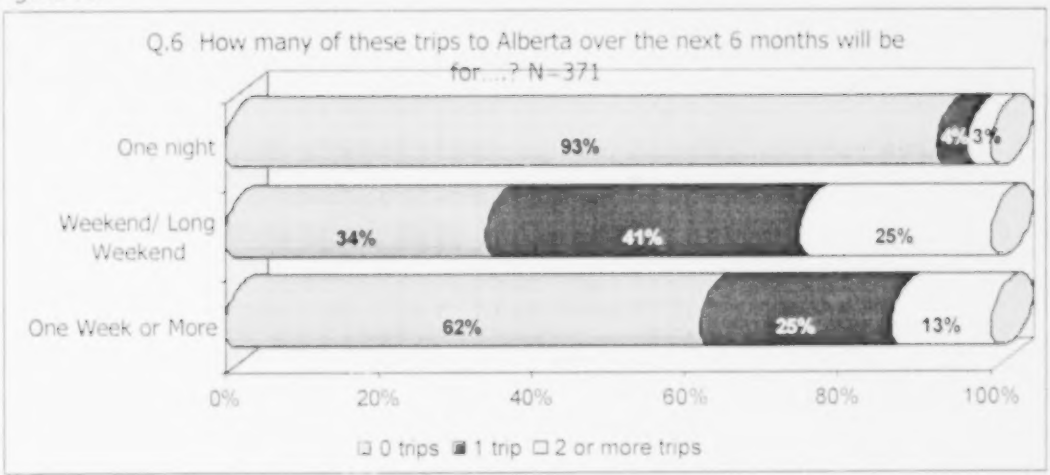
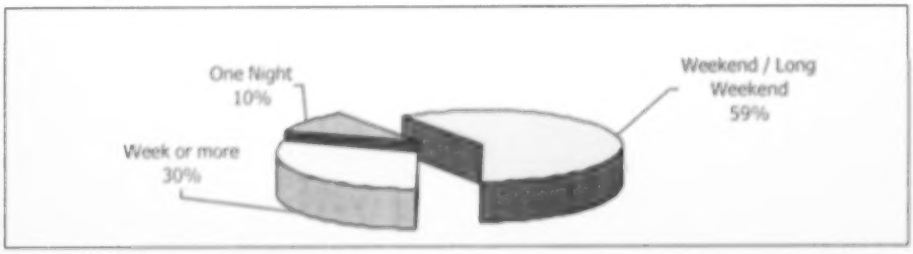


Of the 697 planned Alberta trips more than half (59%) will be for weekends or long weekend trips. The remaining trips will be for one week or longer (30%) or one night only (10%). (See Figure 31 on the following page)

Figure 31 Percentage of Total Alberta Trips Planned by Trip Length



Planning a trip to Alberta can cover a broad range of days. Planning can take less than one (1) day to 365 days for weekend trips, and one (1) day to one (1) year for trips of a week or longer. The average number of days (30.7 days) spent planning a weekend trip to Alberta is slightly more than half the time spent planning trips to Alberta of one week or more (51.1 days). The most frequently mentioned time period for planning both weekend trips or trips of one week or longer to Alberta is 30 days (weekend - 23%, week or longer - 25%). (See Table 16 below)

Table 16

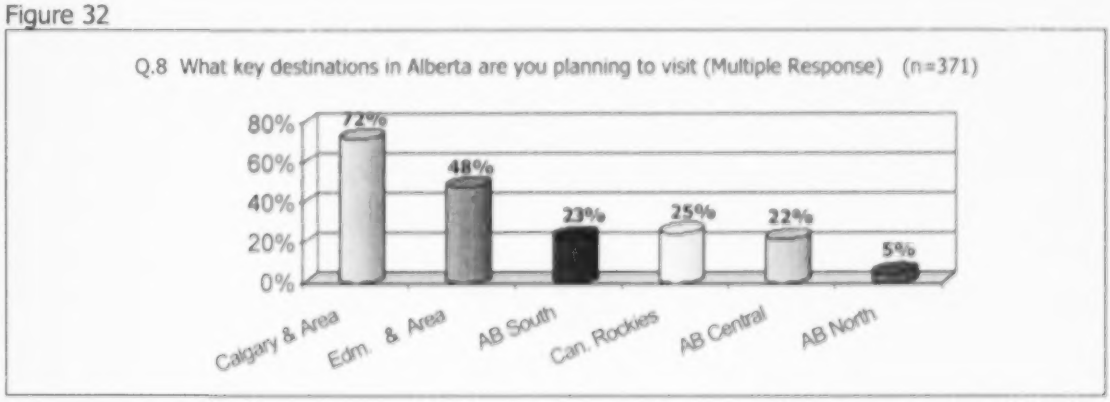
Q.7 How many days in advance do you typically plan leisure trips to Alberta for...	Range	Mean	Mode	Not Applicable*
A. Weekend trips (n=341)	0 to 200	30.7 days	30 days (22.9%)	n=30
B. Trips of one week or longer (n=307)	0 to 365	51.1 days	30 days (25.3%)	n=64

These respondents indicated they do not typically take trips of this length when traveling to Alberta

Destinations

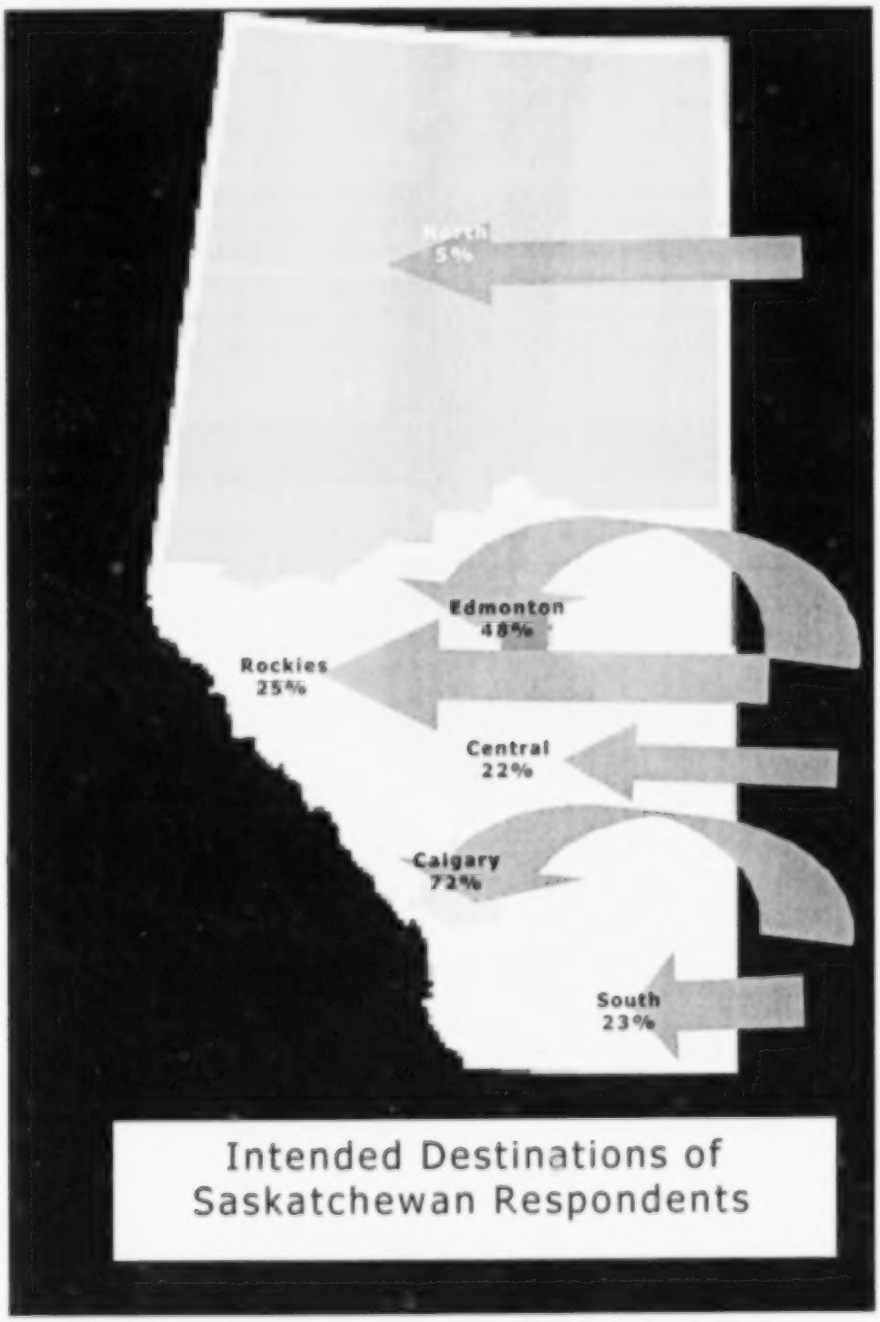
When asked to name destinations they plan to visit in Alberta over the next six months, Saskatchewan respondents most often named destinations in the Calgary & Area (72%) region, followed by destinations in Edmonton & Area (48%). Less than a third are planning to travel to destinations in the Canadian Rockies (25%), to Alberta South (23%), or to Alberta Central (22%). A much smaller 5% intend to travel to the Alberta North region over the next six months. (See Figure 32 below)

Figure 32



(A Flow Map depicting the planned travel from Saskatchewan is noted as Figure 33 below)

Figure 33 – Flow Map of Saskatchewan Respondents Intended Destinations*
**Please note that these results do not take into account the frequency of planned visits to each key destination*



Activities

All respondents who are planning a leisure trip to Alberta over the next six months were asked to indicate how likely they are to participate in a variety of activities while on a trip. A majority of 80% indicated they would be very likely to *Visit family and friends,* for a mean of 3.7 out of 4.

Two of the remaining sixteen activities that were identified by a majority of Saskatchewan respondents as being activities they would also be very likely to participate in, include Indoor Leisure Activities (55%) (Mean=3.3 out of 4) and Outdoor Leisure Activities (45%) (Mean = 3.1 out of 4).

Five activity types, with a mean ranging from 2.6 to 2.0, are activities that Saskatchewan respondents indicated they were more likely to participate in than not while in Alberta. These include: Museums & Historical Sites (2.6 out of 4), Outdoor Summer Sports (2.5 out of 4), Attractions (2.5 out of 4), Outdoor Recreation (2.5 out of 4) and Festivals & Cultural Activities (2.0 out of 4).

The least popular activities, that respondents are *very unlikely* to participate in include: Spectator Sports & Entertainment (1.9 out of 4), the Calgary Stampede/Klondike Days (1.8 out of 4), Aboriginal Attractions (1.6 out of 4), Team Sports (1.6 out of 4), Organized Sports Events (1.5 out of 4), Outdoor Winter Sports (1.5 out of 4), Spas and Other Health Club Activities (1.5 out of 4) and Outdoor Adventure activities (1.4 out of 4). (See Table 17 below)

Table 17

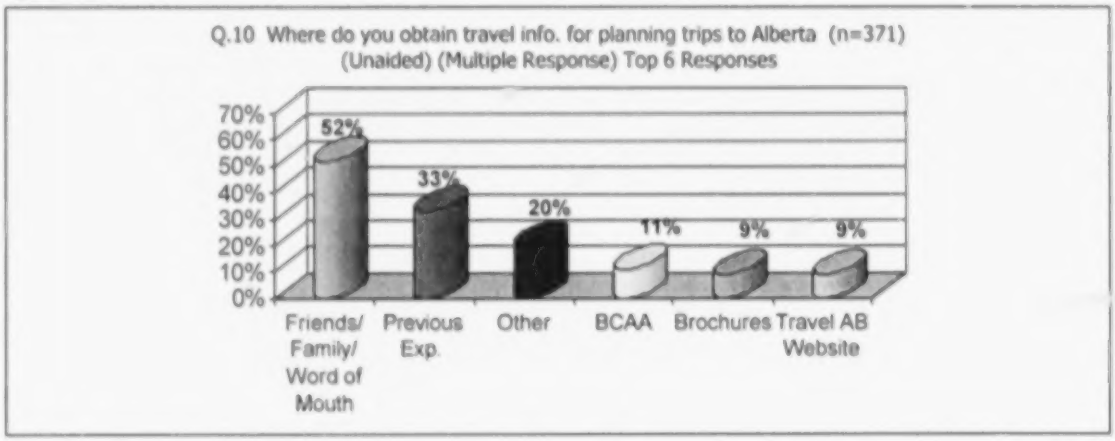
Q.9 Activities Saskatchewan Respondents (n=371)	Likelihood of Participating in...					Mean
	Very Unlikely	Somewhat Unlikely	Somewhat Likely	Very Likely	Don't Know	
Visit Friends & Relatives	3.8%	0.8%	15.9%	79.5%	0	3.7
Indoor Leisure Activities	11.6%	6.2%	27.2%	54.7%	0.3%	3.3
Outdoor Leisure	16.7%	7.3%	30.7%	45.3%	0	3.1
Museums & Historical Sites	31.0%	7.3%	32.9%	28.6%	0.3%	2.6
Outdoor Summer Sports	37.2%	8.1%	26.1%	28.6%	0	2.5
Attractions	35.0%	10.8%	20.8%	33.4%	0	2.5
Outdoor Recreation	42.6%	8.4%	19.9%	29.1%	0	2.4
Festivals & Cultural Activities	49.6%	12.4%	24.5%	13.5%	0	2.0
Spectator Sports & Entertainment	55.3%	12.9%	19.4%	12.4%	0	1.9
Calgary Stampede/ Klondike Days	61.5%	11.9%	13.5%	12.7%	0.5%	1.8
Aboriginal Attractions	66.6%	12.7%	15.1%	5.1%	0.5%	1.6
Team Sports	69.5%	11.3%	10.2%	8.9%	0	1.6
Organized Sports Events	69.8%	12.7%%	10.0%	7.0%	0.5%	1.5
Outdoor Winter Sports	71.7%	12.4%	7.5%	8.4%	0	1.5
Spas & Other Health Club	71.7%	13.5%	10.0%	4.3%	0.5%	1.5
Outdoor Adventure	76.0%	13.2%	6.5%	4.3%	0	1.4

The information sources most likely to be relied on for planning leisure trips to Alberta include:

- *friends, family* or *word-of-mouth* (52%)
- Previous experiences (33%)
- CAA Saskatchewan 11%

Twenty percent (20%) of respondents named a variety of 'other sources' including: the Internet in general, travel agents, or books, or do not rely on any source of information. A small 6% use Tourist Information Centres while 9% utilize the Travel Alberta website or brochures and pamphlets as a source. (Figure 34)

Figure 34



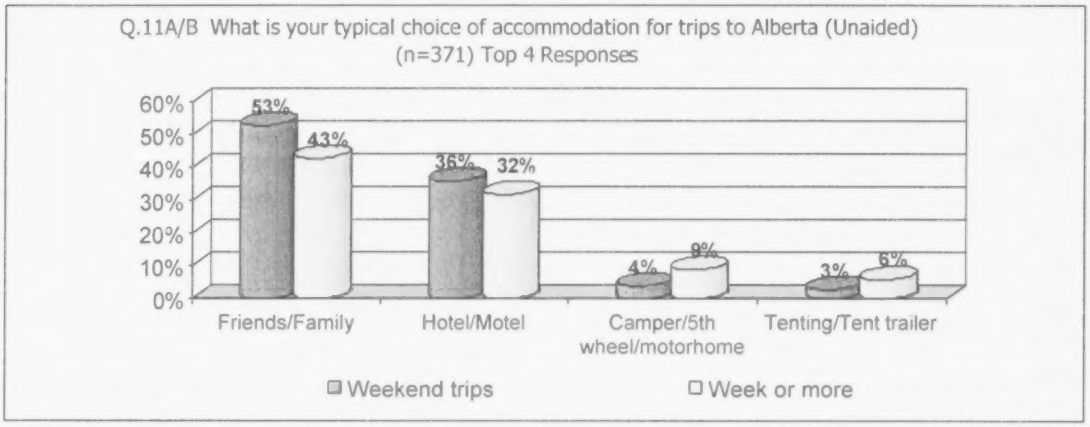
Accommodations

Few differences were noted with respect to their typical choice of accommodations for either a weekend trip, or trips of one week or longer to Alberta; (Figure 8)

- Almost half of respondents will stay with friends or family on weekend trips - 53%, week or longer trips - 43%.
- Over a third would stay in a hotel or motel on weekend trips – 36%, week or longer trips - 32%.
- More respondents typically use a Camper/5th wheel or Motor home for trips of one week or longer (9%) compared to a weekend trip (4%).
- Minor differences were noted for those who choose to use a tent or tent trailer.

(See Figure 35 on the following page)

Figure 35



Advertising Recall

Respondents who are planning a leisure trip to Alberta over the next six months were asked if they could recall seeing, hearing or reading any advertising about travel to Alberta over the previous two to three months. Just over forty percent (41%) indicated they did recall travel advertising, however, when asked to describe the advertising the response was limited.

The media sources most frequently recalled included: brochures (19%), television (18%), and newspapers (15%).

Destination advertising recalled by respondents was coded into the Tourism Destination Regions (TDR). The most frequently recalled destinations are located in the Calgary & Area region (14%), the Edmonton & Area (14%) region, and the Canadian Rockies (7%). Advertising for Alberta South (3%), Alberta Central (1%) and Alberta North (1%) destinations were recalled by a smaller number of respondents.

When asked to provide more specific details of the advertising few could recall any content. The most frequent recall included activities in general (8%), the Calgary Stampede (6%), shopping (4%), events in general (3%), sight-seeing (3%) or golf (3%).

Travel Alberta was mentioned the most frequently as the sponsor of the advertising (6%), followed by the Calgary Stampede (4%), and the AMA/CAA Saskatchewan (3%). West Edmonton Mall (3%) and West Jet (2%) were also identified as sponsors of various ads. (See Table 18 on the following page)

Table 18

Q.12B Please describe the advertising...(Multiple Response) (Unaided) (n=153) Top 6 responses per category							
Media Source		**Destinations**		**Activities**		**Sponsor**	
Brochures	19.0%	Calgary & area	14.4%	Activities in general	7.8%	Travel Alberta	5.9%
TV	18.3%	Edm. & Area	13.7%	Calgary Stampede	5.9%	Calgary Stampede	3.9%
Newspapers	15.0%	Can. Rockies	6.5%	Shopping	3.9%	AMA/CAA Sask	2.6%
Flyers	6.5%	Alberta South	2.6%	Events in general	3.3%	West Ed. Mall	2.6%
Other magazine(s)	4.6%	Alberta Central	1.3%	Sight-seeing	2.6%	West Jet	1.3%
Tradeshows	3.9%	Alberta North	0.7%	Golf	2.6%	Cal/Edm. Tourism	0.7% each
Do not recall	**34.6%**	**Do not recall**	**52.9%**	**Do not recall**	**73.9%**	**Do not recall**	**82.4%**

Global Events

A small 7%, or 24 of Saskatchewan respondents, indicated their travel plans for the next six months have been impacted by recent global events. The most frequently mentioned events include;

- The SARS outbreak (67%)
- The war in Iraq (38%)
- 911 events or terrorism in general (29%)

Remaining factors with less impact include fuel prices, airline restructuring, the West Nile Virus and other identified global events. (See Table 6 on the following page)

When asked how these events impacted their travel plans, almost a quarter said they *"are staying close to home, in Saskatchewan* (21%), and a smaller number said they "*are not flying, only driving"* (8%). Thirteen percent (13%) indicated they are taking fewer trips overall. A variety of "other" reasons are listed in Table 19 on the following page.

Table 19

Q.13A Have any global events made an impact on your travel plans for the next 6 months?			
Yes	6.5%	No	93.3%
Q.13B Which events in particular had an impact? (Multiple Response) (Aided) Saskatchewan Respondents (n=24)		**Q.14 How has this/these event(s) impacted your travel plans for the next 6 months (Multiple response) (Unaided) Saskatchewan Respondents (n=24)**	
SARS	66.7%	Staying close to home in Sask.	20.8%
War in Iraq	37.5%	Taking fewer trips	12.5%
9/11 Terrorism in general	29.2%	Not flying only driving	8.3%
Fuel prices	8.3%	Other;	62.5%
Airline restructuring	8.3%	• Not traveling to Toronto	(7)
West Nile Virus	4.2%	• Not traveling to the US	(4)
Other	4.2% (1)	• Not traveling Internationally	(2)
• All of the above	(1)	• Delayed/cancelled plans	(1)
		• Not traveling to Asia	(1)

Demographics – Table 20

Q.15 Family Composition		Q.16 Age	
Single Parent with Children	4.7%	18 to 24 years	12.0%
Single Adult Household	16.7%	25 to 34 years	17.2%
2 Adults with Children	39.2%	35 to 44 years	22.3%
2 Adults without Children	36.5%	45 to 54 years	17.3%
3 or more Single Adults without children	1.2%	55 to 64 years	12.0%
3 or more Single Adults with Children	0.7%	65 or older	15.8%
Refused	1.2%	Refused	3.3%
Q.17 Income		**Q.18 Are you currently a CAA Saskatchewan member?**	
Less than $25,000	11.5%	Yes	38.8%
$25,000 to $49,999	25.0%	No	59.7%
$50,000 to $99,999	30.8%	Don't Know	0.8%
$100,000 and over	9.5%	Refused	0.7%
Refused	23.2%		
Q.19 Gender			
Male	38.5%		
Female	61.5%		